# 

Statement of Work

Azure Cloud Foundation

Prepared for

Standard Bank

Prepared by

Date: June 22, 2020

Version: 1.2

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This Statement of Work (SOW) and any exhibits, appendices, schedules, and attachments to it are made pursuant to Work Order [TBC] and describes the work to be performed (Services) by Microsoft (“us,” “we”) for Customer,” “you,” “your”) relating to **Azure Cloud Foundations** (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.

Introduction

This project will be the first phase of the Cloud Foundations program. In this project, we will assist with establishing Microsoft Azure as the cloud platform into which various Business applications and Workloads will be deployed will be deployed.

already make extensive use of Azure as well as running some business systems in Azure, In this project, Microsoft will assist with designing and implementing Azure infrastructure to support their security, governance, and workload archetype requirements. This project represents several iterations of design and implementation conducted over a period of weeks.

We are time-boxing the design and implementation effort in recognition of the iterative process required for cloud, the need to demonstrate progress, and the potential benefit to having environments for collaborating across teams such as security, governance, and workload.

has already implemented and invested significant effort in Azure, As one of the initial phases the Microsoft team will perform a “FitGap” analysis, also referred to in this document as Discovery and Insights. The following areas will be assessed,

* Patterns and Principles
* Cloud Strategy
* Cloud Governance & Management
* Identity & Access Management
* Security
* Networking
* Monitoring
* DevOps and Automation
* Backup and Recovery

Based on the findings and collaborative effort between Microsoft and the architectural alignment to Microsoft VDC, Design and deliverables as detailed in this Statement of Work will be customized with the current environment, requirements and context in mind, whilst merging to a foundational principle and Microsoft aligned pattern and practice for implementing Azure.

# Project objectives and scope

## Objectives

The objectives of this project are listed for each workstream in the following table.

| Workstream | Objectives |
| --- | --- |
| Azure platform design and implementation | Design and implement Azure as a platform for cloud-based applications and services.  Develop an infrastructure-as-code solution to implement the design using DevOps practices, and Azure DevOps tooling. |
| Azure platform management | Establish basic monitoring and management functionality using Azure Monitor, Alerts, and Log Analytics.  Setup Azure Update Management to update Windows and Linux virtual machines in Azure.  Set up and configure Azure Backup as an integrated cloud backup for up to 200 Azure virtual machines in a single recovery services vault (baseline). |
| General Azure Advisory and Technical Implementation | In addition to Cloud Platform design and implementation and establishing the cloud platform using native capabilities, Microsoft will provide consultancy to augment the Azure technical and Architecture teams. |

## Areas in scope

### General project scope

Microsoft will provide Services in support of the following scope.

### Project management and governance

| Area | Description | Assumptions |
| --- | --- | --- |
| Project management and governance | Microsoft will support with project management and governance on the Standard Bank’s transformation to Azure through the following activities.  Act as single point of contact for all Microsoft-related activities in the context of this project.  Establish the program governance and own the communication plan.  Monitor the consistency of design decisions across workstreams and teams.  Facilitate the collaboration of the different Microsoft structures with Standard Bank’s stakeholders involved in the project.  Perform weekly and monthly reporting of progress.  Manage the backlog in Azure DevOps with product owner. |  |

### Azure platform design and implementation

| Area | Description | Assumptions |
| --- | --- | --- |
| Azure platform design and implementation | **Discovery**  Structured customer interviews and whiteboarding sessions to learn about Standard Bank’s cloud strategy, current architecture and practices, and desired future state  Discovery from up to 40 Azure subscriptions using Azure Advisor, Azure Security Center, and CloudDockit.  **Insights**  Implement 1 Power BI dashboard to help gain insights into the ’s current and desired future state.  Develop an initial Azure design proposal for this design iteration.  **Design**  Conduct a design workshop to present, discuss, and explore the Azure design proposal.  Assist with setting up a new Azure DevOps project  **Implement**  During the first implementation iteration of a two week sprint, up to **3 VDC design patterns** will be incorporated into Standard Bank’s infrastructure-as-code solution.  During the first implementation iteration, some prioritized activities of the backlog will be addressed.  Implement the approved design in 1 region for a non-production environment using infrastructure-as-code and DevOps practices.  A second Implementation of a two week sprint will implement additional components of the foundation as identified in the Discovery, insights and design phases. | **Design**  This project will use a new Azure DevOps project. Setup will occur during the Design phase.  **Implement**  will participate in all implementation step activities, including planning, implementation, demonstration, and retrospective activities.  will be responsible for determining the final prioritization of all backlog items.  The implementation timeframe will be determined in coordination with Standard Bank.  Implementation is timeboxed to the build and stabilize phases of the project.  Microsoft will not configure the physical routers or network virtual appliances. |

### Azure platform management

| Area | Description | Assumptions |
| --- | --- | --- |
| Azure platform management | **Monitoring**  Conduct a 1-day workshop to:   * + Deliver the monitoring workshop.   + Deliver the monitoring design session.   Design the monitoring solution.  Build out the monitoring design on up to 250 agents.  Create 1 Azure dashboard.  Create up to 10 Azure alerts.  Implement the Network Performance Monitor.  Implement the ExpressRoute Monitor.  **Patch Management**  Conduct a 4-hour workshop providing an overview of Azure analytics and its capabilities to manage the software update process across Windows and Linux servers hosted on Azure IaaS.  Document the patch management design.  Assist with streamlining the software update management process.  Assist with the setup and configuration of the Azure update management solution.  **Backup and Recovery**  Conduct a 4-hour workshop that provides an overview of Azure Backup.  Lead a planning session to discuss Azure Backup requirements, policies, and configuration.  Document the Azure Backup design.  Assist with deploying an Azure Backup solution.  Create and configure one Recovery Service Vault(s) for backing up Azure Virtual Machines.  Configure Azure Backup on up-to 200 Azure Virtual Machines.  Assist with reviewing backup reports.  Provide an IaC template and pattern for the build of Azure Recovery vaults. |  |

### General Azure Advisory and Technical Implementation

| Area | Description | Assumptions |
| --- | --- | --- |
| Azure platform management | **Infrastructure as Code and DevOps**  Assist the bank in developing key IaC assets using Azure Resource Manager (ARM) templates  Support in guiding and establishing DevOps releases using relevant IaC templates  **Cost Management and Charge Back**  Support and establish Azure Tag policies and guide the discussion on cost management and charge back to support Standard Banks’ requirements  **Governance and Policy**  Guide and support in the Role Based Access Model design and the creation of custom roles where required.  Support and establish the creation of relevant Azure policies and Blueprints to support te banks governance and guard rail requirements.  **Guidance on integration with non-native operational components**   * Guide and work with teams on the requirements to integrate, or extend existing technology platforms for backup, monitoring, incident management and configuration management. | A senior Azure consultant will be on-site with teams on a time and materials basis for a period of 8 weeks. |

### Software products and technologies

The products and technology that are listed in the following table are required for project implementation. is responsible for obtaining all identified licenses and products.

| Product and technology item | Version | Ready by |
| --- | --- | --- |
| Azure subscription | Not applicable | Project start date |
| Azure DevOps Services including Azure Boards, Azure Repos, and Azure Pipelines | Not applicable | Project start date |
| VDC Toolkit for DevOps | Latest | Plan phase |
| Power BI Desktop edition | Power BI Desktop edition at no cost | Project start date |

### Environments

The following environments will be required to deliver the project.

| Environment | Location | Responsibility | Ready by |
| --- | --- | --- | --- |
| Development | 1 region selected by Standard Bank | Standard Bank | Project start |
| Test | 1 region selected by Standard Bank | Standard Bank | Project start |
| Production | 1 region selected by Standard Bank | Standard Bank | Project start |

### Testing and defect remediation

#### Testing

The following testing is included in the scope of the project. If has responsibility for testing, the Microsoft effort to support that activity is identified. If additional time is needed for Microsoft testing support, then it can be requested through the change management process described in this SOW.

| Test type (environment) | Description | Responsibility | | |
| --- | --- | --- | --- | --- |
| Has responsibility  for testing? | Provides data or test cases | Provides guidance and support |
| Unit testing (development) | Unit testing is automated for each build and focuses on determining if a unit of code functions as intended.  The Microsoft effort to support this testing is limited to the Build phase. | Microsoft | Microsoft | Customer |
| System testing (development) | System testing focuses on determining whether functionality meets design. During the Plan phase a high-level test plan will be created to guide testing activities. This test plan is a Microsoft Excel workbook listing up to 5 test cases, expected results, and observed results. Testing is focused on Customer-specific scenarios as opposed to generic testing of Azure fundamentals.  The Microsoft effort to support this testing is limited to the Build and Stabilize phases. | Microsoft | Customer | Customer |

#### Defect remediation

If defects are identified during testing, the priority of the item will be jointly agreed upon by and Microsoft. The Microsoft team will attempt to fix all in-scope P1 and P2 defects. If this troubleshooting does not result in root cause identification and resolution within five business days, then additional time can be requested through the Change management process described in this SOW. Defect prioritization is defined in the following table.

| Priority | Description | Remediation in scope? |
| --- | --- | --- |
| P1 | **Blocking defect**  Development, testing, or production launch cannot proceed until this type of defect is corrected. A defect of this type blocks further progress in this area. The solution cannot ship and the project team cannot achieve the next milestone until such a defect is corrected. | Yes |
| P2 | **Significant defect** This type of defect must be fixed prior to moving to production. Such a defect, however, will not affect test plan implementation. | Yes |
| P3 | **Important defect** It is important to correct this type of defect. However, it is possible to move forward into production through the use of a workaround. | No; the problem will be logged. Remediation will be performed through an agreed-upon change request only. |
| P4 | **Enhancements and low priority defects** P4 defects consist of feature enhancement and cosmetic defects. These include design requests that vary from original concepts. | No; the problem will be logged. Remediation will be performed through an agreed-upon change request only. |

## Areas not in scope

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

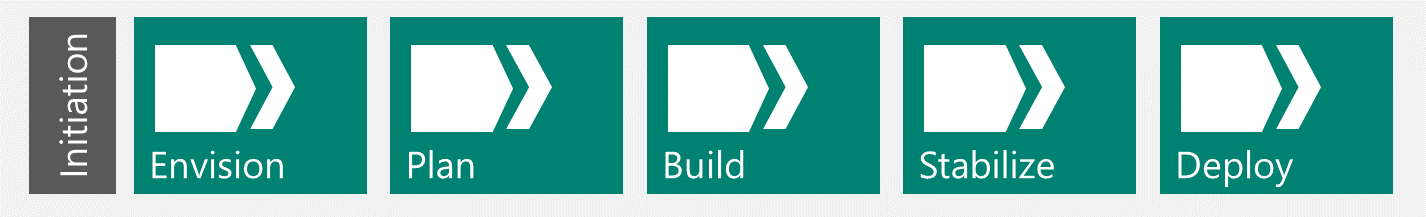
| Area | Description | | |
| --- | --- | --- | --- |
| Product licenses and subscriptions | Product licenses (Microsoft or non-Microsoft) and cloud service subscriptions are not included. | |
| Hardware | Microsoft will not provide hardware for this project. | |
| Integration with third-party software | Microsoft will not be responsible for integration with third-party software. | |
| Data migration | Data migration activities are not in scope for this project. | |
| System integration | System integration and interfaces are not in scope for this project. | |
| Product bugs and upgrades | Product upgrades, bugs, and design change requests for Microsoft products are not in scope for this project. | |
| Source code review | 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 network monitor trace. | |
| Process reengineering | Designing functional business components of the solution is not included. | |
| Customer change management | Designing—or redesigning—Standard Bank’s functional Customer is not included. | |
| Networking | Configuration of physical network devices, such as routers and firewalls, and virtual network appliances deployed on Azure is not in scope. | |
| Certification and accreditation | Customer regulatory compliance certification and accreditation activities outside of general support for existing Customer processes are not in scope. | |
| Workloads | Workload application compatibility, custom application remediation, configuration, or integration of workloads, whether Microsoft or third-party, is not in scope. | |
| Import of existing agile boards | Import of existing agile boards is out of scope. | |
| Azure Application Insights | | Monitoring web applications is not in scope. |
| Azure Automation Runbooks | | Creating Azure Automation runbooks is not in scope. |
| Azure Application Autoscale | | Autoscale of applications is not in scope. |
| Azure Event Hubs | | Sending Azure Monitor data to Azure Event Hubs is not in scope. |
| Azure Logic Apps | | Creating Azure Logic Apps for use with Azure Alerts is not in scope. |
| Ingest and export APIs | | Using APIs to create custom action to either ingest or export Azure Monitor data is not in scope. |
| Containers | | Container platform design or implementation. |

# Project approach, timeline, and deliverable acceptance

## Azure Cloud Foundations Approach

The project will be structured following the Microsoft solution delivery methodology across four distinct phases: Envision, Plan, Build, and Stabilize. Each phase has distinct activities and deliverables that are described in the following sections.

If a deliverable requires formal review and acceptance (a process described in the Deliverable acceptance process section), this is indicated in the following sections.



### Azure Cloud Foundations - 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 or meeting to initiate team formation and communicate expectations.  Document the project launch prerequisites using input from this SOW.  Track the status of launch prerequisites and adjust the engagement initiation phase start date accordingly.  Conduct a detailed walk-through of the SOW with to agree upon an initial project schedule and approach.  Create an initial timeline to be presented during the kickoff meeting.  Prepare and share the detail plan for the Discovery phase and tentative plan for the Design phase, including suggested dates and an agenda.  Identify key personnel from side.  Develop a responsibility assignment matrix (RACI) for and Microsoft. |
| **Customer activities** The activities to be performed by Standard Bank | Attend and participate in the preinitiation call.  Assign project initiation and launch prerequisites responsibilities to accountable Customer leadership and establish target completion dates.  Complete the project initiation and launch prerequisites.  Staff the project with the required Customer resources in the time frames that were agreed upon in the preinitiation call.  The establishment of an ExpressRoute circuit with the organization’s selected ExpressRoute provider can take several weeks, therefore Customer negotiations with a vendor should start as early as possible. |

### Envision

During the Envision phase, the team (Microsoft and Standard Bank) will reach agreement on a shared vision for the project and the specific scope that will be required to make that vision a reality.

|  | |
| --- | --- |
| Category | Description |
| **Microsoft activities** The activities to be performed by Microsoft | Participate in the joint kickoff of the discovery workshop with cloud lead.  Conduct the discovery workshop, topics include:   * + Cloud Strategy   + Cloud Governance and Management   + Identity and Access Management   + Security   + Networking   + Monitoring   + Backup and Recovery   + DevOps and Automation   Facilitate participation from SMEs and decision makers.  Lead with open-ended questions about critical design areas.  Perform dedicated note taking and team note taking.  Conduct a close out meeting to review action items, parking lot items, set expectations for the Insights phase, and begin scheduling the Design phase.  Confirm required Azure resource providers (Azure Advisor, Azure Security Center) have been activated by Standard Bank.  Use the CloudDockit tool to discover Standard Bank’s Azure Subscriptions and generate the reports  Deploy the Continuous Cloud Optimization Power BI dashboard and present its capabilities to customer. |
| **Customer activities** The activities to be performed by Standard Bank | Participate in the joint kickoff of the discovery workshop with the Microsoft tech lead.  Share by leading discussion and whiteboarding sessions to help Microsoft understand Standard Bank’s current and desired future state.  Facilitate participation from SMEs and decision makers.  Verify that prerequisites are met to connect datacenter to Azure. Either an ExpressRoute or a VPN connection is required at the beginning of the engagement.  Procure a non-trial Azure subscription or verify that an Azure enrollment is in place.  Identify the Azure subscriptions to target for data collection.  Enable the required Azure resource providers (Azure Advisor, Azure Security Center) for the selected subscriptions. (Azure Advisor requires 15 days to collect data) |
| **Key assumptions** | The relevant Customer SMEs and decision makers are available for the discovery workshop. Scheduling will occur during the Pre-engagement phase.  Customer representatives are expected to present the current environment in detail to the Microsoft team.  Customer must provide a list of selected Azure Subscriptions to analyze before the engagement if they are already running workloads in Azure  Customer must have an Azure account with enough permissions in those subscriptions they want to analyze if they are already running workloads in Azure |

#### Deliverables

| Name | Description | Acceptance required? | Responsibility |
| --- | --- | --- | --- |
| None | Microsoft will report on what we learned during the Discovery step in the Design step (Plan). | No | Microsoft |

### Plan

During the Plan phase, the team will develop a detailed plan for the project that includes a list of activities that are to be completed, and the project schedule.

|  | |
| --- | --- |
| Category | Description |
| **Microsoft activities** The activities to be performed by Microsoft | **Azure platform design and implementation**  Conduct the internal Insights workshop to review discovery data and arrive at an initial design proposal.   * + Establish a Microsoft internal Azure DevOps project to organize notes from the discovery workshop.   + Review Azure advisor and Azure Security Center recommendations.   + Create a Power BI dashboard to visualize data from the discovery phase.   + Map Standard Bank’s requirements to Microsoft’s: demonstrated practices, design guidance, and reference patterns.   + Create an initial design proposal. Highlight key areas and key Customer requirements addressed by the design.   + Prepare the design documentation: presentation, design and plan document, preparation checklist, test plan, backlog.   Conduct the design workshop with Standard Bank   * + Use the Power BI dashboard to review insights gained from the discovery step.   + Present the initial design proposal to Standard Bank, topics include:     - Subscription Organization and Governance     - Migration Landing Zones     - Network     - Shared Services     - Identity and Access Management     - Policy Management     - Platform Management and Monitoring     - Automation.   + Explore key areas of the design to empower to take decisions.   + Explore Customer’s key requirements addressed by the design.   + Assist with obtaining approval of this design iteration.   **Azure platform management**  Conduct a workshop up to 8 hours in length to gather requirements, information about the current environment, and necessary Customer decisions.  Produce a preparation checklist.  Produce a design and plan document.  **Patch Management**  Workshop on the software update process and the Update Management solution  **Backup and Recovery**  Workshop regarding Azure Backup architecture, components used, storage options, backup policy, and reporting.  Recovery vault planning.  Backup configuration planning.  Azure Backup report planning. |
| **Customer activities** The activities to be performed by Standard Bank | Manage all Change and Release Management activities associated with implementation.  Manage all end-user communication associated with implementation.  Participate in any demonstrations or operational handover workshops for skills and knowledge transfer.  **Azure platform design and implementation**  Confirm external network connectivity to Azure.  Prepare a new Azure DevOps project.  **Azure Platform Management**  Identify servers or workloads to be managed by Azure Backup.  Identify servers to be managed by update management. |
| **Key assumptions** | Standard Bank’s Azure environment must be ready for the Build phase.  Items in the preparation checklist can be remediated within 2 weeks Environmental changes must be made in a manner that supports the overall schedule. Delays can affect the overall schedule and require a change order.  Standard Bank’s Azure DevOps project will be used as the DevOps planning and code repository tool. |

#### Deliverables

| Name | Description | Acceptance required? | Responsibility |
| --- | --- | --- | --- |
| Power BI dashboard | A PBIX file containing a dashboard to visualize data from the discovery phase. | No | Microsoft |
| Preparation checklist | An Excel spreadsheet that documents the tasks which must be completed by and the resources that must be procured to allow for the completion of in-scope work | Yes | Customer |
| Design and plan | A Microsoft Word document that captures design decisions made during the workshop, documents the design for the solution, and details the high-level plan for the completion of in-scope work | Yes | Microsoft |
| Test cases | An Excel spreadsheet that documents the test cases which will be implemented to validate that the implemented solution functions as designed | No | Microsoft |
| Azure DevOps backlog | This deliverable defines the tasks, effort, responsible party, and sequencing to complete the project.  owns the backlog. Microsoft advises, decides. | No | Microsoft |
| Infrastructure-as-code artifacts | Infrastructure-as-code automation templates to deploy and configure your infrastructure on Azure | No | Microsoft |

### Build

During the Build phase, the team will build all of the aspects of the solution and prepare it for final testing.

|  | |
| --- | --- |
| Category | Description |
| **Microsoft activities** The activities to be performed by Microsoft | **Azure platform design and implementation**  Assist with implementing the approved design using infrastructure-as-code and DevOps practices.  Lead the development and testing of the infrastructure-as-code solution.  Modify the infrastructure-as-code solution to begin working against the prioritized backlog to meet the design requirements.  Work to complete the backlog that was defined and prioritized in the Plan phase.  Update, review, and reprioritize the backlog.  **Azure platform management**  Install and configure Log Analytics.  Install Windows/Linux agents  Configure Azure Monitor for VMs solution  Install and configure Agent Health solution in Log Analytics  Create Azure dashboard  Install and configure the Network Performance Monitor solution in Log Analytics.  Install and configure the ExpressRoute Monitor solution in Log Analytics.  Remove this section if Patch Management is not in scope.  **Patch Management**  Activate and configure the Azure Update Management Solution.  Assess the current Software Update Management process.  Install Microsoft Monitoring Agents ((MMA) on up to 25 identified IaaS servers to be managed.  Assist in integration of SCCM with Azure Update Management, if needed.  Assist in integrating the IaaS servers update process with software update management process.  Assist in developing the update deployments:  Update deployment computer groups.  Update deployment exclusions.  Update deployment sequenced cycles (schedules).  Assist in providing report capabilities (Azure Dashboard, View Designer, or Power BI).  **Backup and Recovery**  Configure Azure Backup infrastructure   * + Create a recovery services vault.   + Configure recovery services vault.   + Configure backup (storage replication type).   + Select servers to protect.   Monitoring and alerting   * + Configure backup alerts.   + Configure notifications.   Azure Backup report infrastructure   * + Configure diagnostics (archive, event hub, log analytics).   + Configure Power BI. |
| **Customer activities** The activities to be performed by Standard Bank | Perform implementation activities with assistance from Microsoft.  Manage all Change and Release Management activities associated with implementation.  Manage all end-user communication associated with implementation.  Participate in any demonstrations or operational handover workshops for skills and knowledge transfer.  **Azure platform design and implementation**  Contribute to the development and testing of the infrastructure-as-code solution.  Contribute to the modification of the infrastructure-as-code solution to begin working against the prioritized backlog to meet the design requirements.  Work to complete the backlog that was defined and prioritized in the Plan phase.  Update, review, and reprioritize the backlog. |
| **Key assumptions** | Unit testing of the infrastructure-as-code automation solution will occur throughout the Build phase.  Activities in the Build phase are time-boxed as defined in the Timeline section. |

#### Deliverables

| Name | Description | Acceptance required? | Responsibility |
| --- | --- | --- | --- |
| Implementation iteration completion report | This report lists the in-scope items that have been completed during the implementation iteration, any planned work that was not completed, and any project risks or problems. This report is produced as an output of each implementation iteration. | No | Microsoft |
| Test cases | An Excel spreadsheet that documents the test cases which will be implemented to validate that the implemented solution functions as designed. | No | Microsoft |
| Azure DevOps backlog | This deliverable defines the tasks, effort, responsible party, and sequencing to complete the project.  owns the backlog. Microsoft advises, decides. | No | Microsoft |
| Infrastructure-as-code artifacts | Infrastructure-as-code automation templates to deploy and configure your infrastructure on Azure | No | Microsoft |
| Solution demonstration | This deliverable demonstrates the solution as developed thus far. | No | Microsoft |

### Stabilize

During the Stabilize phase, the team will focus on testing the solution and preparing it for release.

|  | |
| --- | --- |
| Category | Description |
| **Microsoft activities** The activities to be performed by Microsoft | Provide assistance to Standard Bank’s SMEs as they perform system testing of the solution, update test case documentation, and update the backlog |
| **Customer activities** The activities to be performed by Standard Bank | Coordinate resources for, and conduct, all testing needed to review features and functionality.  Lead system testing of the solution.  Take ownership of the solution for ongoing management and support. |
| **Key assumptions** | will perform all testing, with Microsoft assistance.  Activities in the Stabilize phase are time-boxed as defined in the Timeline section. |

#### Deliverables

| Name | Description | Acceptance required? | Responsibility |
| --- | --- | --- | --- |
| Delivery summary | A Word document that summarizes the work completed, provides any relevant maintenance guidance, and documents any recommended next steps | No | Microsoft |
| Implementation iteration completion report | This report lists the in-scope items that have been completed during the implementation iteration, any planned work that was not completed, and any project risks or problems. This report is produced as an output of each implementation iteration. | No | Microsoft |
| Test cases | An Excel spreadsheet that documents the test cases which will be implemented to validate that the implemented solution functions as designed | Yes | Microsoft |
| Azure DevOps backlog | This deliverable defines the tasks, effort, responsible party, and sequencing to complete the project.  owns the backlog. Microsoft advises, decides. | No | Microsoft |
| Infrastructure-as-code artifacts | Infrastructure-as-code automation templates to deploy and configure your container infrastructure on Azure | No | Microsoft |
| Solution demonstration | This deliverable demonstrates the solution as developed thus far. | No | Microsoft |

## Timeline

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

**Azure Cloud Foundations**

| Component | Envision | Plan | Build | Stabilize | Total |
| --- | --- | --- | --- | --- | --- |
| Azure platform design and implementation | 5 days | 15 days | 10 days | | 30 days |
| Azure platform management (monitoring) | 0 days | 3 days | 5 days | 2 days | 10 days |
| Azure platform management (patch management) | 0 days | 1 day | 3 days | 1 day | 5 days |
| Azure platform management (backup and recovery) | 0 days | 2 days | 2 days | 1 day | 5 days |
| Total: | 5 | 10 | 14 | 10 | 55 |

\***Note** that for these components, the number of days in this table represents effort in days based on the hours assigned to relevant tasks in the WBS, and that the WBS also shows a longer duration in days based on time allocated to for remediation activities.

**General Azure Advisory and Technical Implementation**

| Component | Time and Material |
| --- | --- |
| **General Azure Advisory and Technical Implementation** | 8 Weeks at 4 Days per week |

## 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 Standard Bank’s review and approval.

Within three business days of the date of submittal, 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; 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 timeframe 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 as part of project planning.
* **Status reports**: the Microsoft team will prepare and issue regular status reports to project stakeholders per the frequency defined in the communication plan.
* **Status meetings**: the Microsoft team will schedule regular status meetings to review the overall project status, the acceptance of deliverables, and review open problems and risks.

### 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 problems 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 Standard Bank. 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 Standard Bank.
* **The change is accepted or rejected**: has three business days to confirm the following to Microsoft:
  + Acceptance—must sign and return change request form.
  + Rejection—if does not want to proceed with the change or does not provide an approval within three business days, no changes will be performed.

### Executive steering committee

The executive steering committee provides overall senior management oversight and strategic direction for the project. The executive steering committee for the project will meet per the frequency defined in the communication plan and will include the roles listed in the following table. The responsibilities for the committee include:

* Making decisions about project strategic direction.
* Serving as a final arbiter of project problems.
* Approving significant change requests.

| Role | Customer | |
| --- | --- | --- |
| Project sponsor | Customer |
| Delivery manager | Microsoft |

### Escalation path

The Microsoft project manager will work closely with project manager, sponsor, and other designees to manage project problems, risks, and change requests as described previously. 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 Standard Bank)
* Project manager (Microsoft and Standard Bank)
* Microsoft delivery manager
* Microsoft and project sponsor
* Executive steering committee

## Project completion

The project will be considered complete when at least one of the following conditions is met:

* All Microsoft deliverables that require acceptance have been delivered and accepted (or deemed accepted).
* The Work Order has been terminated.

# Project Organization

## Project roles and responsibilities

The key project roles and the responsibilities are as follows.

#### Customer

| Role | Responsibilities |
| --- | --- |
| **All streams -** Project sponsor | Make key project decisions.  Serve as a point of escalation to support clearing project roadblocks. |
| **All streams -** Project manager | 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. |
| **All streams -** Technical team lead | Serve as the primary technical point of contact.  Take responsibility for technical architecture and driving decisions that facilitate the Azure design creation.  Coordinate the installation and configuration activities of the required hardware elements. |
| **All streams -** Network lead | Serve as the primary point of contact for the subject area.  Verify connectivity to Azure, VPN, or ExpressRoute.  Take responsibility for managing and performing the installation and configuration of subject area components. |
| **All streams -** Storage or backup lead | Serve as the primary point of contact for the subject area.  Take responsibility for managing and performing the installation and configuration of subject area components. |
| **All streams -** Security lead | Serve as the primary point of contact for the subject area.  Take responsibility for managing and performing the installation and configuration of subject area components. |
| **All streams -** Operations lead | Serve as the primary point of contact for the subject area.  Verify that Azure services will be integrated in the existing management environment.  Take responsibility for managing and performing the installation and configuration of subject area components. |

#### Microsoft

| Role | Responsibilities |
| --- | --- |
| Delivery manager | Manage and coordinate the overall Microsoft project.  Serve as a single point of contact for escalations, billing problems, personnel matters, and contract extensions.  Coordinate Microsoft and Microsoft subcontractor resources but not Customer resources. |
| Microsoft project manager(s) | Manage and coordinate Microsoft project delivery.  Take responsibility for problem and risk management, change management, project priorities, status communications, and status meetings.  Coordinate Microsoft and Microsoft subcontractor resources but not Customer resources. |
| Azure architect(s) | Serve as the technical lead for the entire project and take responsibility for the scope.  Lead the Fit/Gap analysis and architecture sessions and deliver selected workshops.  Take responsibility for the Azure reference design document and drive the decision process with Standard Bank.  Assist with Azure configuration and other solution build activities.  Assist with solution testing.  Support the solution walk-through. |
| Azure consultants(s) | Perform the Fit/Gap analysis.  Deliver the architecture design sessions.  Write the Azure reference design document.  Lead the Azure configuration and other solution build activities using infrastructure-as-code principles.  Lead the solution development activities.  Lead solution testing.  Lead the solution walk-through. |
| Microsoft security consultants | Deliver the architecture design sessions for security.  Lead the ASC configuration and other solution build activities related to security.  Contribute to the solution development activities.  Contribute to solution testing.  Contribute to the solution walk-through. |

# Customer responsibilities and project assumptions

## Customer responsibilities

In addition to Customer activities defined in the Approach section, 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 personnel, including business user representatives, and access to funding if additional budget is needed to deliver project scope.
  + This includes the identification of key personnel (stakeholders, decision makers, architects, and subject matter specialists) to participate in the workshops, design sessions, and testing activities described in the Approach section.
  + This includes allocating enough qualified staff to run the workstreams in parallel.
* Confirm key personnel availability and coordinate personnel participation.
  + Key personnel will attend workshops and design sessions to provide requirements and participate in the discussions and decision making.
  + Key personnel identified to participate must be empowered to make decisions on behalf of and to engage and coordinate with other teams.
  + Key personnel will be able to make and approve binding design decisions in three days.
  + Key personnel required for the project will complete all identified preparation tasks to facilitate implementation of the solution
* Provide access to systems.
  + This includes access to all necessary Customer work locations, networks, systems, and applications (remote and onsite).
  + is responsible for configuring and controlling all Azure subscriptions and consumption.
* Provide a work environment.
  + This consists of suitable work spaces, including desks, chairs, and Internet access.
* Manage non-Microsoft resources.
  + will assume responsibility for the management of all Customer personnel and vendors who are not managed by Microsoft.
* Manage external dependencies.
  + 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 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 8 AM and 5 PM, Monday through Friday.
  + When travel to a Customer location is required, the arrival time, especially on Mondays, might vary depending on the travel time. This also applies for departure time on Fridays.
* 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 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 Standard Bank.
* Staffing:
  + If necessary, Microsoft will make staffing changes. These can include, but are not limited to, the number of resources, individuals, and project roles.
  + Microsoft resources will be mobilized up to four weeks from the date of the Work Order signature.
  + If work is interrupted, the activities may be resumed once requested and agreed to by Microsoft. In this case Microsoft may require up to six weeks to mobilize the resources and have the complete project team in place. In this situation Microsoft cannot guarantee that the team members will be the same team members who worked previously in the project.
* 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.