# 

Statement of Work

Prepared for

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This Statement of Work (SOW) and any exhibits, appendices, schedules, and attachments to it are made pursuant to Work Order 6ZAF201-260353-308257 and describes the work to be performed (Services) by Microsoft (“us,” “we”) for Gauteng Provincial government through State Information Technology Agency (“”, “”, “Customer,” “you,” “your”) relating to Email branding (“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

 engaged Microsoft to provide them with a proposal to move ’s email from the hosted service provider to Exchange Online. One of the components required for the Exchange Online mailboxes is the ability to have email branding and campaigns. This Statement of Work covers the email branding service.

# Project objectives and scope

## Objectives

The objectives of this project are to give the ability to:

* centrally manage email signatures processed by Exchange
* have consistent signatures on all email with auto-completed details like names, departments and job titles pulled from Active Directory
* design the email signature template with logos, legal disclaimers, marketing banners, social media links and more
* vary email signatures for different teams and departments
* have full HTML signatures on all devices including mobiles (iPhone, Blackberry, Android devices, iPad etc.)
* ability to update and distribute every signature with a single click via Exchange
* end users don’t have to do anything to receive a new email signature

## Areas in scope

### General project scope

Microsoft will provide Services in support of the following scope.

| Area | Description | Assumptions |
| --- | --- | --- |
| Email signature service | Configuration and integration with Office 365  Workshop signature requirements  Investigate current signature configuration in Mimecast.  Migrate signatures to new signature service | The functionality is based on the exclaimer software offering for 39 000 users  The proposal assumes server- side signatures will be deployed for Office 365 users and will not include client-side deployments.  The project will create 3 x new signatures that is based on exiting designs, time boxed to 40 hours.  Messages protected by Information Rights Management will not get signatures attached as it would not be processed correctly  Email branding licenses will be procured by Microsoft and will be valid for 12 months post migration with an option to renew  Email branding solution will be in production once all mailboxes has been migrated at which time Mimecast will not be used for any services anymore. |

### System integration

The following system integration is in scope for the project.

| Integration | Description of scope | Responsibility | | Ready by |
| --- | --- | --- | --- | --- |
| O365 Exchange Online | Exclaimer integration with Office 365 | Microsoft | Before MX records are changed to Office 3565 | |

### Environments

The following environments will be required to deliver the project.

| Environment | Location | Responsibility | Ready by |
| --- | --- | --- | --- |
| Production | Customer | Customer | Start of this project |

### Testing and product support

#### Testing

The following testing is included in the scope of the project. If the Customer 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 |
| User acceptance testing (UAT) | The user functionality of key real world scenarios will be tested. Test cases are based on the functional specification document. The Microsoft effort to support this testing is limited to 8 hours. | Customer | Customer | Microsoft |

#### Products Support

Support for 3rd party component (email branding) will be done by Hypercare once email branding is activated but any defect remediation in the product will be referred to vendor and follow terms and conditions of the vendor.

## 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.

| 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 other than exclaimer. |
| Product bugs  and upgrades | Product upgrades, bugs, and design change requests for Microsoft products are not in scope for this project. |
| 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 network monitor trace. |
| 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. |

# Project approach, timeline, and deliverable acceptance

## Approach

The project will be structured to follow an Engagement Initiation and Configure and Implement phase.

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 in order 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 the customer in order 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.  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. |

### Configure and Implement

During the Configure and Implement phase, the team (Microsoft and the Customer) will reach agreement on a shared outcome of the signature scope and requirements.

|  | | |
| --- | --- | --- |
| Category | Description | |
| **Microsoft activities** The activities to be performed by Microsoft | One 4 hours workshop to determine signature requirements  Investigate current signature configuration in Mimecast  Document Signature requirements and sign-off from client  Setup and configuration of service  Configure signatures based on signed requirements documentation  User acceptance testing with customer selected pilot users that have been migrated  Remediate any issues found during pilot testing  Configure remaining users  Remediate remaining issues |
| **Customer activities** The activities to be performed by the Customer | Make available required resources to attend the requirements workshop  Review and give prompt feedback on Signature requirements document  Select pilot users for acceptance testing |
| **Key assumptions** | No Client-side deployment will be done by the project, only server-side deployment integrated with Office 365.  User data in Active Directory is up to date  Email branding will be activated once the MX records are switched to Office 365 and Mimecast Stationary is decommissioned |

### Email Branding as a Service

During the Email branding as a service the Microsoft Hypercare team will provide support for the solution.

|  | | |
| --- | --- | --- |
| Category | Description | |
| **Microsoft activities** The activities to be performed by Microsoft | The Post Migration Hypecare team will provide support to implement email signature changes |
| **Customer activities** The activities to be performed by the Customer | Customer to provide requirements for email signature changes |
| **Key assumptions** | Branding service is available for 12 months post migration and will run in parallel with Post Migration Hypercare |

#### Deliverables

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Description | Acceptance required? | Responsibility |
| Automated Email Signature deployed within customer environment | Automated Signatures is deployed and working on outgoing and internal email | Yes | Microsoft |
| Signature requirements document | Describes the signature requirements related to ’s specifications | Yes | Microsoft |

## Timeline

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

## 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 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 the customer 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 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.

### 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 issues.
* Approving significant change requests.

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

### 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
* 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 |
| --- | --- |
| Project sponsor | * Provide part-time project commitment * Make key project decisions. * Serve as a point of escalation to support clearing project roadblocks. |
| Project manager | Provide part-time project commitment  Serve as 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. |
| Technical team lead | Project commitment will vary based on the different phases the delivery has  Serve as primary technical point of contact.  Take ownership of technical architecture and code deliverables. |
| Lead business analyst | Part-time project commitment  Serve as primary functional point of contact for the team that is responsible for functional business analysis. |

#### Microsoft

| Role | Responsibilities | |
| --- | --- | --- |
| Delivery manager | 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 | 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 lead architect | Interface with technical resources to implement the signature solution. |
| Partner technical resources | Configure and implement email branding service based on requirements | |

# Customer responsibilities and project assumptions

## Customer responsibilities

In addition to 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 workspaces, 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:

* Workday:
  + The standard workday for the Microsoft project team is between 8 AM and 5 PM local time, 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.
* 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.