**Divestiture Migration for Modern Workplace**

Statement of Work

Prepared for

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# **Introduction**

() are going through the process of divesting their Power Grids division to form a new, separate legal entity and which will involve migrating approximately 35’000 users and their associated data and applications.

The initial steps, which for legal reasons have to be completed by 30th June 2020, involve the creation of a new Azure AD environment in a new Azure tenant so that from the 1st July 2020 the Power Grids users can start working with a new identities in a separate email environment.

Associated with this is the migration from Skype for Business to MS Teams and the migration of user-related SharePoint Online and One Drive for Business data.

# **Project objectives and scope**

## **Objectives**

The objective of this engagement is to support with planning and assessment for the initial identity, and exchange for Business migration. One focus area will be on the planning for content migration as the timelines for migrating the required volumes of data are challenging.

In addition to supporting the technical migration planning Microsoft will also support ’s adoption and change management planning, helping create a governance model and transition plan. Microsoft will also support an assessment if the current operating model ensuring the new organization, helping identify any gaps in processes, tooling and skills (and the need for additional training).

**Note:** Microsoft Office 365 merger, acquisition, and divestiture migrations are complicated and subject to unique constraints; this is especially true when migrating between Office 365 tenants. Not all services and data can be effectively migrated, and tradeoffs will be required for user experience and other factors. It is the objective of Microsoft Services to navigate you through these tradeoffs, help you make well-informed decisions, and plan for and complete the migration in a way that minimizes disruption and maximizes migration fidelity to the extent possible.

The project will include the following components:

|  |  |
| --- | --- |
| **ID** | **Component name** |
| MAD-01 | Office 365 Migration Planning for Merger, Acquisition, or Divestiture |
| MAD-02 | Identity and EMS Migration Planning for Merger, Acquisition, or Divestiture |
| REM-01 | General Remediation Support |
| ACM-01 | Modern Workplace Adoption and Change Management Assessment |
| MSM-01 | Modern Service Management Operations Readiness Governance |

## **Areas in scope**

### **General project scope**

The project components and scope for Merger, Acquisition, Divestiture Migration for Modern Workplace are specified in the following table:

|  |  |  |
| --- | --- | --- |
| **Component (ID)** | **Description** | **Assumptions** |
| Office 365 Migration Planning for Merger, Acquisition, or Divestiture (MAD-01) | * Discovery of the in-use services within 1 source environment, with associated relevant configuration and data volumes. A source environment is defined as a single Microsoft Office 365 tenant and any on-premises Microsoft Exchange Server, Skype for Business Server, or Microsoft SharePoint Server environments within a single Active Directory Domain Services (AD DS) forest integrated with that tenant. * Facilitate decision-making related to the services and data that will be included in the scope of the migration * Creation of a preliminary plan for migration to 1 target Office 365 environment(s), including a recommended high-level migration architecture, an approach, migration sequencing, and estimated timelines | The Customer will provide required access to run discovery scripts against in- scope source environments or Customer will run the scripts with guidance provided by Microsoft. |
| Identity and EMS Migration Planning for Merger, Acquisition, or Divestiture (MAD-02) | * Discovery of the services in use within 1 source environment. A source environment is defined as:   + 1 Active Directory forest and 1 associated Azure Active Directory tenant   + 1 Microsoft Intune tenant * Facilitate decision-making related to the services that will be included in the migration scope * Creation of a plan for migration to 1 target Active Directory forest(s) and associated Azure Active Directory tenant(s), including recommended high-level migration architecture, approach, migration sequencing, and estimated timelines | The Customer will provide required access to run discovery scripts against in- scope source environments or Customer will run the scripts with guidance provided by Microsoft. |

|  |  |  |
| --- | --- | --- |
| **Component (ID)** | **Description** | **Assumptions** |
| General remediation support (REM-01) | Work done at Customer direction to provide technical guidance and assistance during the completion of tasks documented in the preparation checklist work product (limited to 40 hours over a duration no longer than two weeks) | None |
| Adoption and Change Management Assistance (ACM-01) | * Microsoft will assess the current state of the people, technology, and culture of the organization to determine change impact and risk and the change baseline, and identify gaps through the use of one-on-one interviews and assessment tools. A high-level change strategy to mitigate identified risks and close gaps will be developed through the use of recommended change management tactics across each change lever (communications, learning, resistance management, and sponsorship, for example). * Microsoft will create a change management governance model that outlines required roles, responsibilities, time commitments and allocation, an escalation matrix, and required approval processes. * Microsoft will prepare, develop, and present a transition plan document that compares the measured engagement outcomes with the desired baselined outcomes, and re-baseline (if applicable). Microsoft in the transition document, will also provide recommended next steps and corrective actions (if applicable). | The Customer has a change management lead who can identify resources, and schedule and assist in coordinating interviews and gathering organizational information. |
| Modern Service Management Operations readiness governance (MSM-01) | **Service delivery and operations capability review and plan**   * Assess current operational processes and capabilities to get an improved understanding of the current state. * Understand the desired state and what the Customer has already done toward its goal of the desired state and upcoming go-live. * In collaboration with the Customer, build a plan and a roadmap for the desired state prioritization. * Where possible, review any existing tools and processes that can be used going forward. | **Service delivery and operations capability review and plan**   * Existing operational process documentation exists, and the Customer will walk Microsoft through the current state. * The Customer will provide current pain points related to the current operations processes and capabilities. * A skills assessment will be performed by the |

|  |  |  |
| --- | --- | --- |
| **Component (ID)** | **Description** | **Assumptions** |
|  | * Existing documentation may be used to identify gaps in skills and the type of training necessary for risk remediation. | Customer with assistance from Microsoft.   * Key Customer subject matter experts (SMEs) and decision makers are available to work with Microsoft. |
| Digital Advisory Services (DAS- 01) | * Support in creating and implementing a program of change to support the Power Grids Divestiture. * Identify key migration interdependencies, and bring together overall workstreams, their relationships or dependencies to one another, technical activities, and expected user experience. * Together with your team, Microsoft digital advisors will help you:   + Help plan the desired future state.   + Consider alternative ideas and related business cases to accelerate divestiture from . * Help prioritize tasks and activities with a focus on risk identification aligned with the Divestiture plan. * Support the Adoption and Change Management process. | None |

### **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** |
| Not applicable | Office 365 licenses (including source and target tenants) | Any | Start of the Enable phase |

### **Environments**

The following environments will be required to deliver the project.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Component ID** | **Environment** | **Location** | **Responsibility** | **Ready by** |
| All | Production | Customer | Customer | Project start |

## **Areas out of scope**

Any area not explicitly included in the [Areas in scope](#_bookmark3) 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. |
| Client | Deployment and configuration of client software is out of scope for the project unless explicitly listed as in scope in the [General project scope.](#_bookmark4) |
| Integration with third-party software | Microsoft will not be responsible for integration with third-party software. |
| Product bugs and upgrades | Product upgrades, bugs, and design change requests for Microsoft products. |
| 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. |
| 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. |
| End-user communications | It is the Customer’s responsibility to use the guidance provided by Microsoft regarding required end-user actions and end-user experience to draft and manage end-user communications throughout the migration, unless this work is explicitly listed as in-scope elsewhere in this statement of work.  Microsoft will also not manage any direct end-user communications associated with the project. |

|  |  |  |
| --- | --- | --- |
| **Component ID** | **Area** | **Description** |
|  | Lab environment | Creation of a development or testing lab environment is not included. |
| Training | Formal user training or the creation of training materials is not in scope. |
| Custom Solution | Any custom solution development is not in scope. |
| Performance testing | Performance or stress testing for any environment is not included. |
| Governance and regulatory compliance | Microsoft will not be responsible for assessment or review of governance, regulatory, or compliance requirements. |
| Persona development | Microsoft will not be responsible for the development of personas impacted by the migration. |
| MAD-01 | Detailed content assessment | Discovery of the source environment (or environments) does not include a content-level review of SharePoint sites, Microsoft OneDrive sites, mailboxes, or other service data, or provide item-level remediation guidance. This work is out of scope unless explicitly listed as in- scope elsewhere in this SOW. |
| Planning for migration to on- premises Office systems | Planning is limited to an Office 365 target environment. |
| Planning for the migration of related systems and infrastructure | Office 365 migration planning is limited to Office services. Planning will take into consideration the parallel migration of related systems, including directory services and management infrastructure, but planning for those migrations is out of scope unless explicitly listed as in- scope elsewhere in this SOW. |
| MAD-02 | Planning for the migration of Office 365 and other workloads | * Scope is limited to the planning of AD DS, Azure Active Directory, Azure Information Protection, and Intune. * Migration planning for workloads such as Office 365, Cloud App Security, Microsoft Advanced Threat Analytics, Azure Advanced Threat Analytics and related Services are not in scope unless explicitly listed as in-scope elsewhere in this SOW. |

|  |  |  |
| --- | --- | --- |
| **Component ID** | **Area** | **Description** |
|  | Discovery of Active Directory–dependent applications | Discovery of the source environment (or environments) does not include identifying which applications are dependent on the Active Directory domain or forests or Azure Active Directory. |
| System Center Configuration Manager and Intune comanaged implementations, including Cloud Management Gateway | * Discovery of the source environment(s) does not include identifying specific Services and configuration based on System Center Configuration Manager or Cloud Management Gateway. * The migration plan may acknowledge the existence of such services but has Intune as its primary focus and migration plan. |
| ACM-01 | Branding | Corporate branding design and related graphic elements are not in scope. |
| Business case development | Business case creation for the technology investment is out of scope. |
| MSM-01 | Operational processes | Design or redesign of operational processes is not included outside of the cloud Service operational scope defined in the Areas in scope section. |
| Service management implementation | Microsoft is not responsible for the implementation of recommendations, configuration changes, or Service management tooling of any kind. The Customer is solely responsible for implementing the recommendations and configuration changes with guidance and support from Microsoft, as needed, according to the scope of this engagement. |
| Third-party monitoring tools | Implementation or configuration of third-party monitoring tools and APIs. |

# **Project approach and timeline**

## **Approach**

The project will be structured following the Online Solution Lifecyle delivery methodology and will consist of four distinct phases: Assess, Remediate, Enable, and Migrate. Each phase has distinct activities and work products that are described in the following sections.



The activities for each in-scope project component will be organized into these phases, and components will generally progress through project phases together. The Assess phase activities for most components, for example, will be completed before the project proceeds to the Remediate phase, and the Remediate phase activities for most components will be completed before the project proceeds to the Enable phase. Microsoft reserves the right to delay the start of individual project components, when necessary, for the purposes of work prioritization or staffing optimization. During the Assess phase, a project plan will be produced that documents the detailed delivery schedule for this engagement.

### **Engagement initiation**

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

|  |  |  |
| --- | --- | --- |
| **Category** | **ID** | **Description** |
| **Microsoft activities** The activities to be performed by Microsoft | All | * Conduct a preinitiation call 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 to agree on an initial project schedule and approach. |
| **Customer activities** The activities to be performed by the Customer | All | * Attend and participate in the preinitiation call. * Assign project initiation and launch prerequisite 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. |

### **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](#_bookmark9) 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. |

|  |  |
| --- | --- |
| **Category** | **Description** |
|  | * Document, discuss, and review conditions of satisfaction and define critical success factors of the project. * Create a risks, actions, issues, decisions (RAID) log and review it with the Customer. * Generate a project communication matrix that can be used to identify meeting cadence, key stakeholders, and the general communication strategy. * Create a preliminary project status report to review with the Customer Project Manager and refine as necessary based on that person’s input. * Deliver workshops and complete other Assess phase activities for in-scope components as defined in [Project components and work products](#_bookmark9) section. * Produce a preparation checklist that details the tasks that are needed to complete the in-scope Enable phase activities, including the resources that must be procured by the Customer. * Produce design and plan documentation. * Produce a project plan for Microsoft project activities for this engagement.   **Remediate phase**   * Generate a weekly project status report and facilitate project status review meetings with the project team. * Provide technical guidance and assistance, and answer questions during the Customer-led completion of identified preparation tasks. * Provide input on user communications related to the project.   **Enable phase**   * Produce test cases that will be used to validate the implemented Solution functions as designed. * Complete Enable phase activities for in-scope components as defined in [Project components and work products](#_bookmark9) section. * Complete in-scope testing for the project. * Produce delivery summary documentation for the project.   **Migrate phase**   * Complete Migrate phase activities for in-scope components, as defined in [Project components and work products](#_bookmark9) section. |
| **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 for project workshops. |

|  |  |
| --- | --- |
| **Category** | **Description** |
|  | * Provide project resources and subject matter experts (SMEs) to participate in workshops and follow-up meetings. * Review the high-level project plan * Make necessary design and planning decisions in a timely fashion to facilitate completion of the Assess phase within the timelines documented in Timeline section. * Review the RAID log with the Microsoft project manager and assign appropriate resources to actions, issues, and risks. * Develop a project communication matrix. * Provide templates or review existing templates that will be used for weekly status reports and steering committee reports * Review all Assess phase work products. * Produce and manage the project plan for Customer project activities.   **Remediate phase**   * Complete all tasks identified in the preparation checklist and procure all required resources for the project within the timelines established for remediation, as documented in General project scope section. * Update the project plan with updates to project activities and status received from Customer project team members. * Assist in facilitating weekly project status review meetings. * Prepare user communications for the project.   **Enable phase**   * Provide required production access to Microsoft resources or resources who can work alongside Microsoft to facilitate completion of in-scope implementation tasks. * Update the project plan with status received from Customer project team members. * Review test cases and other Enable phase project work products. * Participate in in-scope testing for the project and complete any testing activities assigned to the Customer. * Assist in facilitating weekly project status review meetings. * Manage the change management process to facilitate timely completion of production implementation tasks. * Take ownership of the solution for ongoing management and support. * Manage all end-user communications associated with implementation tasks.   **Migrate phase**   * Manage scheduling and end-user communications for in- scope Migrate phase activities. |

|  |  |
| --- | --- |
| **Category** | **Description** |
| **Key assumptions** | * If the defined duration or effort for remediation is exhausted before the completion of critical path (blocking) remediation and preparation tasks, a change will be submitted following the Change management process in order to adjust project scope, timeline, and cost as necessary. * The Customer will make all necessary design and planning decisions during the Assess phase of the project. |

#### General project component work products:

Microsoft will produce the following project work products that include content from in-scope project components in the phases shown. Not all components will be covered in all work products, and [Project](#_bookmark9) [components](#_bookmark9) section documents how each component will be covered in these project work products. Work products will either be prepared as combined documents with content for all in-scope components, or multiple component-specific instances of these work products will be produced. During the Assess phase of the project, Microsoft and the Customer will mutually agree on a consolidated or per- component work product structure.

Additional component-specific work products may be produced for the project and any such work products are described in section [Project components and work products.](#_bookmark9)

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Description** | **Phase** | **Responsibility** |
| Project plan | Key Microsoft activities, milestones, dependencies, and durations for this engagement | Assess | Microsoft |
| Preparation checklist | An Excel spreadsheet that documents the tasks that must be completed by the Customer and the resources that must be procured in order to complete the in-scope work. | Assess | Microsoft |
| Design and plan | A Word document that captures design decisions made during the workshop, documents the design for the solution, and details the high-level plan for completion of the in-scope work. | Assess | Microsoft |
| Delivery summary | A Word document that summarizes the work completed, provides any relevant operational guidance, and documents any recommended next steps. | Enable | Microsoft |

### **Project components and work products**

The following subsections describe the activities for in-scope project components, organized by overall project phase. These activities will be combined with the [general project activities](#_bookmark8) to establish the overall project approach. The unique work products for each component, and the project work products to which each component contributes, are also described below.

#### Office 365 Migration Planning for Merger, Acquisition, or Divestiture (MAD-01)

|  |  |
| --- | --- |
| **Category** | **Description** |
| **Microsoft activities**  The activities to be performed by Microsoft | **Assess**   * Complete the automated discovery of service usage information in the in-scope environment—running Microsoft-supplied scripts or guiding the Customer through the running of said scripts. * Conduct interviews, as necessary and at Microsoft discretion, to augment or refine information gathered through automated discovery to facilitate migration planning. * Assess service usage information to determine feasibility of migration to a target Office 365 tenant. * Conduct a migration planning workshop, limited to 8 hours in total duration per in-scope target environment, to review service usage information and assessment findings with the Customer; facilitate decision-making related to the services that will be included in the scope of migration; and establish the preliminary migration plan. |
| **Customer activities**  The activities to be performed by the Customer | **Assess**   * Provide Microsoft with the permissions necessary to run discovery scripts on in-scope source environments or alternatively, run those scripts with guidance from Microsoft. * Participate in interviews needed to augment discovered information and answer questions related to service usage and configuration. * Participate in the migration planning workshop and make decisions required for completion of the migration plan. |
| **Key assumptions** | None |
| **Project work products** Content for this project component will be included in these project work products | * Preparation checklist * Design and plan |

#### Identity and EMS Migration Planning for Merger, Acquisition, or Divestiture (MAD-02)

|  |  |
| --- | --- |
| **Category** | **Description** |
| **Microsoft activities**  The activities to be performed by Microsoft | **Assess**   * Complete the automated discovery of identity and EMS usage information in the in-scope environment, running scripts to be supplied by Microsoft or guiding the Customer through the running of said scripts. * Conduct interviews, as necessary and at Microsoft discretion, to augment or refine information gathered by automated discovery to facilitate migration planning. * Conduct a migration planning workshop, limited to 8 hours in total duration per in-scope target environment, to review identity and EMS usage information and assessment findings with the Customer, facilitate decision-making related to the Services that will be included in the scope of migration, and establish the migration plan. |
| **Customer activities**  The activities to be performed by the Customer | **Assess phase**   * Provide Microsoft with the permissions necessary to run discovery scripts against in-scope source environments with guidance from Microsoft. * Participate in any required interviews to augment discovered information and answer questions related to identity and EMS usage and configuration. * Participate in the migration planning workshop and make decisions required for completion of the migration plan. |
| **Key assumptions** | None |
| **Project work products** Content for this project component will be included in these project work products | * Preparation checklist * Design and plan |

#### Modern Workplace Adoption and Change Management Assessment (ACM-01)

|  |  |
| --- | --- |
| **Category** | **Description** |
| **Microsoft activities**  The activities to be performed by Microsoft | **Assess phase**   * Identify groups of people who will be affected by the technological change and users who will be targeted for the engagement. |

|  |  |
| --- | --- |
| **Category** | **Description** |
|  | * Conduct up to 12 one-on-one interviews with Customer associates to assess current change culture, characteristics, and risks. * Review Customer census information and develop a geographical change landscape map. * Complete the third-party Prosci Project Change Triangle, change characteristics, and change maturity assessments. * Assess change management risk based on outcomes of the Prosci assessments and assign risk scores. * Define current state characteristics for the organization, technology, and workstyle or culture (digital culture change). * Identify positive change attributes to incorporate into an adoption implementation strategy. * Identify change risks to be mitigated. * Identify a mitigation strategy for each identified change risk. * Develop a high-level change strategy that incorporates recommended practices for each lever of change (communications, training, sponsorship, and resistance management, for example). * Develop and align adoption strategy recommendations for each lever of change based on the outcomes of the assessments (such as additional strategy recommendations beyond recommended practices that are based on the specific outcomes of the assessments). * Incorporate risk mitigation recommendations into the high-level change strategy.   **Governance**   * Recommend a change management team structure. * Recommend change management team roles. * Recommend change management team responsibilities. * Recommend resource allocation and time commitment. * Develop a change management escalation path or process. * Develop required approval paths and processes for communications content, training content, and formal documents. * Develop customized role descriptions for each role in the final team structure. * Develop customized responsibilities for each role in the final team structure. * Document the alignment between the sponsors and members of the change network in each business unit or division and the core change management team.   **Assess closeout (Transition)** |

|  |  |
| --- | --- |
| **Category** | **Description** |
|  | * Transition change management activities to appropriate Customer roles. * Provide recommended next steps, including remaining users to be addressed, and methods that can be used to enhance established behavioral changes. * Compare engagement outcomes with defined intended outcomes at the beginning of the engagement. * Compare engagement outcomes with the baseline findings (if applicable, the assessment, baseline, and roadmap components must be delivered). * Develop a transition plan. * Prepare and present the transition plan document. * Facilitate a closeout meeting. |
| **Customer activities**  The activities to be performed by the Customer | **Assess phase**   * Identify and schedule up to 12 participants for workshops or interviews. * Provide census information and organizational charts at the time of kickoff. * Act as a participant in interviews.   **Governance**   * Identify and assign change management team resources according to the governance model. * Confirm recommended roles, responsibilities, and time commitments or allocations. * Provide information on each business unit or division that is in scope. * Identify potential sponsors and members of the change network for each in-scope business unit or division.   **Assess closeout (Transition)**   * Attend and participate in the closeout meeting. * Review and approve the recommended next steps. * Accept and assume responsibility for the recommended next steps. * Take action as outlined in the transition plan. |
| **Key assumptions** | **Assess**  No activities  **Governance (Remediate)**   * The Customer will dedicate the required resources called out in the governance model. |

|  |  |
| --- | --- |
| **Category** | **Description** |
|  | * The Customer will allocate the resources needed for the recommended time commitment.   **Transition (Enable)**   * The Customer will assume responsibility for the recommended next steps for change management activities and corrective actions. * The Customer will take action as outlined in the transition plan. |
| **Project work products** Content for this project component will be included in these project work products | Not applicable |

##### Component work products: ACM-01

Microsoft will produce the following additional work products for this project component.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Description** | **Phase** | **Responsibility** |
| Baseline document | A document that contains the following:   * Information about affected stakeholder groups * A current state summary * A change risk score * A change characteristics assessment score * Change risks * Existing positive-change attributes * Recommended mitigation strategies for change | Assess | Microsoft |
| Adoption strategy | A document that contains information about the following:   * The ability to build on key findings from the baseline document * Strategies for mitigating risks identified in the baseline document * Strategies for incorporating existing positive change attributes * Defining recommended tactics to be used for:   + Sponsor engagement   + Champions and a change network   + Communications   + Training   + Resistance management   + Rewards and reinforcement   + Adoption measurement | Assess | Microsoft |

|  |  |  |  |
| --- | --- | --- | --- |
| Governance document | A document that contains information about the following:   * Change management roles and role descriptions * Change management responsibilities * Required time commitment and allocation * Escalation paths * Required review and approval processes used for communication materials, training content, and formal documents * Alignment between sponsors and members of the change network for each business unit or division and the core change management team | Assess | Microsoft |
| Transition document | A document that contains information about the change management transition plan, including:   * Recommended next steps * Remaining users to be addressed * Recommended methods that can be used to enhance established behavior changes * Comparisons of engagement outcomes to intended outcomes defined at the beginning of the engagement | Enable | Microsoft |

#### Modern Service Management Operations Readiness Governance (MSM-01)

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| --- | --- |
| **Category** | **Description** |
| **Microsoft activities**  The activities to be performed by Microsoft | **Assess**   * Deliver the engagement kickoff presentation to key stakeholders. * Prepare a shared online collaboration site (such as Microsoft Teams or a Microsoft SharePoint site) that will be used to collaborate with the Customer, configure the space for the engagement, and add Customer participants. * Develop the meeting schedule, including times, locations, and participants. * Discover and review the current state IT service management practices and operational models.   Service delivery and operations capability review and plan:   * Conduct up to 2 interactive workshops to understand the current state as it relates to operational processes and capabilities. * Conduct up to 2 interactive workshops to understand the desired state and put together a plan and roadmap on how to |

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| --- | --- |
| **Category** | **Description** |
|  | achieve the operational desired state with a focus on the CloudOps and DevOps models.   * Where possible, review any existing tools and processes that can be used going forward. |
| **Customer activities**  The activities to be performed by the Customer | **Assess**   * Provide participant email addresses and help make sure the participants can access the workspace. * Provide documentation and access to existing IT operation, Service management, and governance processes that are currently in place. * Invite qualified and knowledgeable Customer stakeholders to participate in each in-scope meeting as identified by Microsoft. * Confirm the availability of participating stakeholders for each meeting and set up appropriate expectations for them to actively participate in these sessions. * Obtain meeting rooms that can accommodate participants for each meeting scheduled.. |
| **Key assumptions** | **Assess phase**   * The Customer has a general knowledge of the cloud workload and Service being implemented, its features and capabilities, and has developed a consensus on intended use relative to current communication and collaboration solution usage. * The Customer can assign relevant stakeholders to work with Microsoft Services during the Plan phase activities to review requirements and modules to be covered in the designated engagement timeframe. * Customer stakeholders have allocated sufficient time to participate in workshops over the course of the next phase. * The Customer is accountable for sending meeting invitations or logistics to identify stakeholders and confirm availability and participation. * Customer stakeholders are knowledgeable about and have authority to advise on decisions and directives. |
| **Project work products** Content for this project component will be included in these project work products | Not applicable |

#### Component work products: MSM-01

Microsoft will produce the following additional work products for this project component.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Description** | **Phase** | **Responsibility** |
| Operation plan and roadmap | A Microsoft Word document that lists out an operation plan and roadmap with a modern Service management and DevOps focus | Assess | Microsoft |

#### Digital Advisory Services (DAS-01)

|  |  |
| --- | --- |
| **Category** | **Description** |
| **Microsoft activities**  The activities to be performed by Microsoft | **Assess phase**   * During the Assess phase, the team (Microsoft and the Customer) will reach agreement on a shared vision for the project and the specific scope that will be required to make that vision a reality. * Create patterns and practices that are to be used for the program of change beyond Office 365, identity, and EMS by pulling in Microsoft Services resources for input as needed, not to exceed 80 hours * Ideate on high-priority scenarios related to employees, operations, and products in order to achieve a program of change within the Customer environment. * Build supporting materials that summarize decisions related to user experience and tooling approaches for the Customer’s leadership team. * Support discussions across the Customer executive team to achieve internal alignment on the Customer side (for example, approach, funding needs, scope, and partner usage). |
| **Customer activities**  The activities to be performed by the Customer | **Assess phase**   * Assign project initiation and launch prerequisite responsibilities to accountable Customer leadership and establish target completion dates. * Complete the project initiation. * Make Customer representatives, IT staff, and resources available. * Provide access to information about the Customer organizations. * Staff the project with the required Customer resources in the time frames that were agreed upon in the preinitiation call. |
| **Key assumptions** | none |
| **Project work products** Content for this project component will be included in these project work products | Not applicable |

#### Component work products: DAS-01

Microsoft will produce the following additional work products for this project component.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Description** | **Phase** | **Responsibility** |
| Presentation | * A visual representation of migration activities * Workstream estimates – including timing and interdependencies at month-level granularity * Expected user experience, including user scenarios * Options, if applicable, that outline key factors aligned to your environment * Risks and mitigation strategies * Potential benefits of the Microsoft approach | Assess | Microsoft |

## **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.

Project Initiation (part time)

1 weeks

Assess

3 weeks

Remediate

1 weeks

Enable

3 weeks

## **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, 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 3 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 3 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**

The fee arrangement related to each component described in this SOW is outlined in the table below. The completion language applicable for each fee arrangement is below the table.

##### Time and Materials

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](#_bookmark12) will be followed and the contract modified. The component 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: 2h/week * Make key project decisions. * Serve as a point of escalation to support clearing project roadblocks. |
| Project Manager | All | * Provide the estimated project commitment: 40h/week * 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. |
| Migration Architect | All | * Communicate requirements for the migration, and coordinate with the project sponsor. * Participate in the planning workshop and work with the project sponsor to make decisions necessary for completion of the migration plan. |
| Operations Lead | All | * Provide daily support that is related to ongoing system management and recovery. * Take responsibility for creating policies and operational models for the new architecture. * Create operational guides for the new environment. |

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| --- | --- | --- |
| **Role** | **Component ID(s)** | **Responsibilities** |
| Service Desk Lead | All | * Take responsibility for problem resolution and first- level incident management when the system is in production. |
| Office 365 Tenant Global Administrator | MAD-01, DAS-01 | * Work with Microsoft to run discovery scripts. * Participate in required interviews and answers questions related to service usage and configuration, and coordinate with other Customer resources to answer those questions. * Participate in the migration planning workshop. |
| On-Premises Office Server Administrator | MAD-01. DAS-01 | * Work with Microsoft to run discovery scripts. * Participate in any required interviews and answers questions related to service usage and configuration, and coordinate with any other Customer resources to answer those questions. * Participate in the migration planning workshop. |
| Active Directory administrator | MAD-01, MAD-02 | * Work with Microsoft to run discovery scripts. * Participate in any required interviews, answer questions related to Active Directory usage and configuration, and coordinate with any other Customer resources to answer those questions. * Participate in planning workshops. * Take responsibility for the on-premises AD DS forest (or forests). * Take responsibility for the implementation of interforest synchronization that supports the solution if Microsoft is not contracted separately to complete this work. * Participate in validation testing. * Assist with user mapping between the source and the target. |
| Azure Active Directory administrator | MAD-01, MAD-02, DAS-01 | * Work with Microsoft to run discovery scripts. * Participate in any required interviews, answer questions related to Azure Active Directory usage and configuration, and coordinate with other Customer resources to answer those questions. * Participate in the planning workshops. * Take responsibility for Azure Active Directory integration solutions in the source and target environments. * Participate in validation testing. * Assist with user mapping between the source and target. |

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| --- | --- | --- |
| **Role** | **Component ID(s)** | **Responsibilities** |
| Intune Administrator | MAD-02 | * Work with Microsoft to run discovery scripts. * Participate in any required interviews, answer questions related to Intune usage and configuration, and coordinate with other Customer resources to answer questions. * Participate in the migration planning workshop. |
| User communications lead | All | * Draft and send user communications related to user actions and experience upon migration to a new tenant. * Participate in the workshop. * Work with the Microsoft consultant to verify the technical accuracy of user communications. |
| Help desk lead | All | * Take responsibility for help desk preparedness ahead of the migration. * Oversee the help desk during and after migration and assist with escalation of Tier 3 problems to the project team, as necessary. |
| Program Management Office (PMO) Leads | ACM-01 | * Attend the activities, sessions, workshops, or classes relevant to the PMO scope and help drive program change and adoption initiatives. * This role typically owns the integration of change management and technical workstreams. |
| Customer ACM program executive sponsor | ACM-01 | * Make key project decisions, escalate unresolved problems as appropriate, and clear project roadblocks. * 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. * Review project progress and financials and assist with subject matter specialist engagement. * Have a degree of direct control over the systems and tools being affected by the change. * 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. * Be able to make the following time commitments: |

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| --- | --- | --- |
| **Role** | **Component ID(s)** | **Responsibilities** |
|  |  | * A minimum 0.5 days of participation in interviews and meetings during the adoption and change management (ACM) assessment and baseline. * A minimum 0.25 days of participation in interviews and meetings during the ACM governance model component. * Note: the sponsor should be at, or on the equivalent level of, chief information officer, chief technical officer, chief marketing officer, chief revenue officer, chief people officer, other top-level executive, or business unit leader. |
| Change managers | ACM-01 | * Serve as the primary point of contact for the Microsoft team. * Manage and coordinate the overall change management project. * Take responsibility for your resource allocation, risk management, project priorities, and communication with executive management. * Provide information that is accurate, timely (within 3 business days or as mutually agreed upon), and complete. * Provide access to systems. This includes access to all necessary Customer work locations, networks, systems, and applications (remote and onsite). * Manage and facilitate any interactions with related projects or programs in order to manage external project dependencies. * Assist with SME engagement. * Be able to make the following time commitment of a minimum of 10 hours per week during the assessment and baseline component activities. |
| Business unit leaders | ACM-01, DAS-01 | * Attend activities, sessions, workshops, or classes that are relevant to the business or relevant to the employees in their respective organizations. * Participate actively and visibly throughout the project. * This role will typically be responsible for:   + Implementing the transformation of the organization   + Building a coalition of sponsorship with peers and managers * Communicating effectively with employees and managers |

#### Microsoft

|  |  |  |
| --- | --- | --- |
| **Role** | **Component ID(s)** | **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 | * Review discovery information. * Lead the migration planning workshops. * Design the overall solution. * Provide guidance based on Microsoft-recommended practices. * Take responsibility for final document work products. |
| Microsoft Consultant (or Consultants) | All | * Works with the Customer to run discovery scripts. * Conduct interviews to complete discovery. * Participate in the migration planning workshop and contribute to the creation of document work products. * Leads workshops and produce project work products. * Provide technical assistance during the completion of Customer preparation tasks. * Act as primary technical subject matter expert from Microsoft during the project. * Complete in-scope implementation and migration activities. |
| Microsoft ACM architect | ACM-01 | * Manage the Microsoft ACM project delivery. * Take responsibility for Microsoft ACM resource allocation, risk management, project priorities, and communication with executive management. * Verify that document development and associated activities are completed according to the plan. * Provide ACM thought leadership. * Deliver ACM sessions, workshops, work products, and documents. * Verify that project sponsors are equipped with the knowledge and tools to perform the required activities. |
| Microsoft ACM consultant | MAD-03 | * Have deep knowledge of, and skills in, specific ACM domains. |

|  |  |  |
| --- | --- | --- |
| **Role** | **Component ID(s)** | **Responsibilities** |
|  |  | * Take responsibility for the ACM delivery of sessions, workshops, work products, or documents relative to their specialty area. * Verify that the Customer change manager is equipped with the knowledge and tools needed to effectively manage the change network. |
| Modern Service Management (MSM) Architect | MSM-01 | * Design the overall solution. * Provide guidance based on Microsoft-recommended practices. * Typically, architects will work part time on the engagement. |
| MSM Consultant | MSM-01 | * Conduct workshops and discussions on in-scope operations topics * Take responsibility for preparing defined work products |
| Digital advisor | DAS-01 | * Facilitate Customer working sessions with the intended outcome of gaining Customer leadership alignment on an overall approach for interdependent technical workstreams, user experience, and delivery timing. * Act as an advisor to the Customer, challenging it to consider the potential benefits of other approaches and their benefits. * Engage resources across Microsoft—as needed—to minimize decision time and delivery risk. |

# **Customer responsibilities and project assumptions**

## **Customer responsibilities**

In addition to the Customer activities defined in the [Approach](#_bookmark7) section, the Customer is also required to:

* Provide information.
  + This includes accurate, timely (within 3 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 8 AM and 5 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 3 nights and 4 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.