# 

Statement of Work

Exhibit: Azure Stack Foundation

Prepared for

Wells Fargo

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This project exhibit, along with the Statement of Work (SOW), Wells Fargo - Azure Pack to Azure Stack Migration Master v2.0(“master SOW”), and other project attachments, provide a complete view of the program and do not stand in isolation. The program governance and common processes to be followed for this project are described in the master SOW.

Introduction

Wells Fargo is interested in migrating its key applications from Windows Azure Pack to function in a hybrid cloud environment using cloud-native Microsoft Azure services using the on-premises Azure Stack platform.

The Azure Stack Foundation Offering includes core deliveries that support post-deployment integration planning to be executed during this phase of delivery.

The goals for the Azure Stack Foundation Offering are to:

* Provide education to Wells Fargo that helps the Customer prepare to operate and deploy workloads on Azure Stack.
* Prepare Wells Fargo to capitalize on hybrid cloud opportunities with Azure and Azure Stack.
* Verify that Wells Fargo design decisions are consistent with Microsoft standards for deploying and configuring Azure Stack.
* Configure Azure Stack to the point of minimum viable operations, so that Wells Fargo has no barriers to deploying the first workloads onto Azure Stack.
* Provide an executive summary presentation that describes what was planned and has been accomplished using Azure Stack.

# Project objectives and scope

## Objectives

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

Table 1: Project objectives and scope

| Workstream | Objectives |
| --- | --- |
| Azure Stack Foundation Core | Help Wells Fargo understand Azure Stack capabilities, including the technical and business considerations required to integrate the Solution into your datacenter. |

## Areas in scope

### General project scope

Microsoft will provide Services in support of the following scope.

Table 2: General project scope

| Area | Description | Assumptions |
| --- | --- | --- |
| Azure Stack Foundation Core | Two weeks long engagement with education and Hands-On sessions to help Wells Fargo understand the breadth of Azure Stack and support them to configure a minimum viable product. | The original equipment manufacturer Azure Stack SKU stamp has already been deployed by and entity (partner) not involved in this scope.  An Azure Stack Development Kit instance has already been deployed by Wells Fargo. |

### Environments

The following environments will be required to deliver the project. The Customer is responsible for obtaining licenses and products for the specified environments.

Table 3: Environments

| Environment | Location | Responsibility | Ready by |
| --- | --- | --- | --- |
| Azure | Customer-selected Azure region | Customer | Start of Plan phase |
| A deployed and certified original equipment manufacturer Azure Stack SKU | Customer’s on-premises datacenter | Customer | Start of Plan phase |
| Azure Stack Development Kit–supported hardware | Customer’s on-premises datacenter | Customer | Start of Plan phase |

### Testing and defect remediation

#### Testing

The following testing is included in the scope of the project.

Table 4: Testing

| Test type (environment) | Description | Responsibility | | |
| --- | --- | --- | --- | --- |
| Has responsibility  for testing? | Provides data or test cases | Provides guidance and support |
| Unit testing (Azure Stack) | Unit testing is automated for each build and focuses on determining if a unit-of-code functions as intended. | Microsoft | Microsoft | Customer |

#### Defect remediation

If defects are identified during testing, the priority of the item will be jointly agreed-upon by the Customer and Microsoft. Defect prioritization is defined in the following table.

Table 5: Defect remediation

| 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 with 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 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, in addition to those in the master SOW, are listed in the following table.

Table 6: Areas out of scope

| Area | Description | |
| --- | --- | --- |
| Implementation of Azure Stack Development Kit for production workloads | Implementation of the Azure Stack Development Kit, which is a nonproduction, single-node instance of Azure Stack that supports development and test activities for application developers and enterprise administrators, is out of scope. While solutions and integration can be modeled, designed, and developed using this platform, Microsoft does not support running production workloads on Azure Stack Development Kit installations. |
| Third-party hybrid connectivity network virtual appliances | There are third-party solutions available to establish hybrid connectivity between the Azure Stack stamp and remote locations. These network virtual appliances are not supported by Microsoft and the deployment and configuration of these solutions must be done by Wells Fargo. |
| Active Directory configuration | Configuration of Active Directory Domain Services (AD DS) and Azure Active Directory, beyond that which is explicitly required to support Azure integration, is out of scope. |
| Certification and accreditation | Customer regulatory compliance certification and accreditation activities outside of general support for existing Customer processes is out of scope. |
| Certification and accreditation | Development of accreditation documentation required in support of the environment. Microsoft will provide guidance and input into these documents however the customer is responsible for coordinating the preparation and review of required documentation. |
| OEM Hardware Deployment | Deployment of the Azure Stack scale units is the responsibility of the OEM vendor and will not be completed by Microsoft. |

# Project approach, timeline, and deliverable acceptance

## Approach

The project will be structured following the Microsoft solution delivery methodology across 4 distinct phases: Envision, Plan, Build, and Closure. 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 in the master SOW), this is indicated in the following sections.

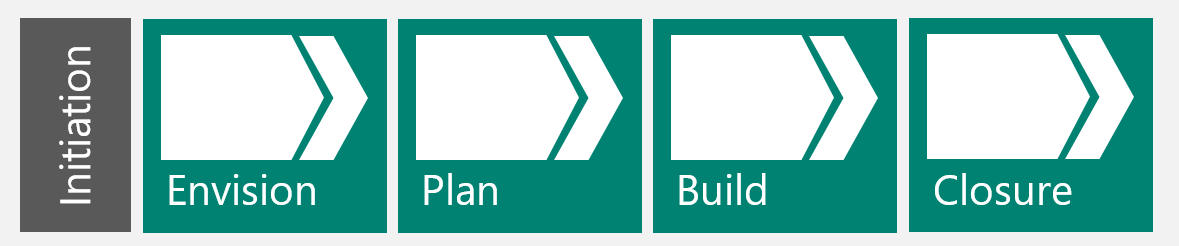


Figure 1: Project Approach

### Engagement initiation

Before beginning the project, the following prerequisites must be completed in addition to those listed in the Program initiating section of the master SOW.

Table 7: Engagement initiation

| 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 exhibit.  Track the status of launch prerequisites and adjust the engagement initiation phase start date accordingly.  Conduct a detailed walk-through of the exhibit with the Customer in order to agree on an initial project schedule and approach. |
| **Customer activities** The activities to be performed by the Customer | OEM deployment and configuration is complete  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.  Complete site-readiness activities that are a prerequisite for the completion of Microsoft Services tasks (such as hardware deployment) will be completed before the start of the engagement. Failure to complete site-readiness activities that are required for Microsoft to deliver its Services according to the agreed-upon project schedule can result in project delays requiring change orders to this project and additional project costs.  Customer networking staff will be responsible for external networking configuration. |

### Envision

During the Envision 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.

Table 8: Envision

|  | |
| --- | --- |
| Category | Description |
| **Microsoft activities** The activities to be performed by Microsoft | Lead a formal project kickoff meeting to begin onsite activities.  Create a mutually agreed-upon vision and scope. |
| **Customer activities** The activities to be performed by the Customer | Verify that prerequisites that connect the Customer datacenter to Azure have been met.  Procure a non-trial Azure subscription or verify that an Azure enrollment is in place.  Determine, and coordinate the timing of, key personnel availability.  Participate in the service kickoff meeting. |

#### Deliverables

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Description | Acceptance required? | Responsibility |
| Vision and scope document | The vision and scope document for the Azure Stack Foundation Core module consists of:  The agreement that between the team and [insert the customer’s name] reached on the desired Solution  The overall project direction | No | Microsoft |
| Azure Stack Foundation kickoff presentation | A presentation that summarizes the overall engagement activities | No | Microsoft |

### Plan and Build

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

The Plan and Build phases are focused on educating the Customer on infrastructure aspects of Azure Stack and working with the Customer to either build the expected configuration of its multimodal Azure Stack system (or systems) or by modeling the expected configuration using an Azure Stack Development Kit instance.

Table 9: Plan and Build

|  | |
| --- | --- |
| Category | Description |
| **Microsoft activities** The activities to be performed by Microsoft | The following topics will be covered by the consultant during the Plan and Build phases:   * Azure Stack governance * Azure Stack billing * Azure Stack infrastructure as a service IaaS * Azure Stack platform as a service * Azure Stack DevOps introduction * Azure Stack support * Azure Stack deployment patterns |
| **Customer activities** The activities to be performed by the Customer | * Participate in the educational sessions. * Make or confirm design decisions about the configuration of the production Azure Stack. * Participate in the implementation of the Azure Stack configuration that is based on accepted design decisions. The configuration will either be implemented in the deployed Azure Stack multimodal scale units or into a development or test environment through the use of an Azure Stack Development Kit server (this server would be provided by the Customer). |
| **Key assumptions** | * The original equipment manufacturer Azure Stack SKU stamp has already been deployed by and entity (partner) not involved in this scope. * An Azure Stack Development Kit instance has already been deployed by Wells Fargo. * Any required environmental changes must be made in a manner that supports the overall schedule. Delays in required changes can affect the overall schedule and require a change order. |

#### Deliverables

| Name | Description | Acceptance required? | Responsibility |
| --- | --- | --- | --- |
| **Design decisions spreadsheet** | A Microsoft Excel spreadsheet that describes the Azure Stack–related design and configuration decisions made during this phase of the engagement. | No | Microsoft |

### Closure

During the Closure phase, the team closes the project and discusses possible next steps based on the lessons learned during the Plan and Build phase

Table 10: Closure

|  |  |
| --- | --- |
|  | |
| Category | Description |
| **Microsoft activities** The activities to be performed by Microsoft | Conduct the closeout meeting. |
| **Customer activities** The activities to be performed by the Customer | Participate in closeout meeting. |

#### Deliverables

| Name | Description | Acceptance required? | Responsibility |
| --- | --- | --- | --- |
| Azure Stack Foundation Core executive summary | PowerPoint presentation with the Azure Stack Foundation Core module executive summary | No | 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.

Figure 2: Timeline

This engagement is two weeks in duration, and two weeks of effort.

# Project organization

## Project roles and responsibilities

In addition to roles and responsibilities listed within Master SOW, listed below are the key project roles and the responsibilities for this project.

#### Customer

Table 11: Project roles and responsibilities - Customer

| Role | Responsibilities |
| --- | --- |
| Technical team lead | Serve as primary technical point of contact.  Take ownership of technical architecture and code deliverables.  Coordinate installation and configuration activities for required hardware elements.  Attend the technical workshops. |
| Lead business analyst | Serve as primary functional point of contact for the team that is responsible for functional business analysis of target applications and Services that are envisioned to be hosted on Azure Stack.  Attend the technical workshops. |
| Application or workload lead | Serve as primary point of contact for the subject area.  Share the application requirements and define the application infrastructure.  Manage and perform the installation and configuration of subject area components.  Attend the technical workshops. |
| Network lead | Serve as primary point of contact for the subject area.  Manage and perform the installation and configuration of subject area components.  Attend the technical workshops. |
| Storage lead | Serve as primary point of contact for the subject area.  Manage and perform the installation and configuration of subject area components.  Attend the technical workshops. |
| Security lead | Serve as primary point of contact for the subject area.  Manage and perform the installation and configuration of subject area components.  Attend the technical workshops. |
| Active Directory lead | Serve as primary point of contact for subject area.  Manage and perform the installation and configuration of subject area components.  Attend the technical workshops. |
| Operations lead | Serve as primary point of contact for subject area.  Manage and perform the installation and configuration of subject area components.  Attend the operations workshops. |

#### Microsoft

Table 12: Project roles and responsibilities - Microsoft

| Role | Responsibilities | |
| --- | --- | --- |
| Microsoft project manager | Part time  Manage and coordinate the overall Microsoft project.  Serve as a single point of contact for escalations, billing issues, personnel matters, and contract extensions.  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 Azure architect | Part time  Lead the SAW and select SAW modules.  Assist with Azure configuration and other Solution build activities.  Assist with Solution testing.  Support the Solution walk-through. |
| Microsoft Azure consultants | Full time  Lead select SAW modules.  Lead Azure configuration and other solution build activities.  Lead Solution development activities.  Lead Solution testing.  Lead Solution walk-through. |
| Microsoft ITSM Consultant | Lead the Azure Stack Operations workshops. |