# [Customer Name] – ITL and Cloud Readiness Response

**Date:** {date m/d/y }\_\_\_\_\_\_\_\_\_\_ | **Prepared by:** {SA\_name}

For {customer\_name}

{partner\_name}

{country}

{city}

## 1. Executive Summary

*A brief overview of project goals, scope, phases, and key deliverables.*

{TEXT\_EXEC\_SUMMARY}

# Scope

\*\*{In Scope-txt}\*\*:

Example Phases 0–5  
\*\*{Out of Scope-text }\*\*:

Example Phases 6–7 (not priced in this SoW)

# Objectives

{TEXT\_OBJECTIVES}

# 4. Deliverables

📊 {EXCEL\_DELIVERABLE\_TRACKER}

{team-task-table}

example

|  |  |
| --- | --- |
| **Team** | **Tasks Covered** |
| **Audit / Assessment Team** | - Automated discovery of infrastructure and applications |
|  | - Initial system baselining |
| **Audit / Licensing Team** | - Software license compliance audit |
| **FinOps / Audit Team** | - TCO modeling & cloud suitability |
| **Security Audit Team** | - Risk and vulnerability assessment (e.g., CVEs, EOL systems) |
| **Solution Architects** | - Review business & technical environment- Infra/app dependency inventory- Network & connectivity review- Performance, storage, and security analysis- Use case and emerging tech analysis- Cloud architecture & network design- DevOps and observability policies- Cost analysis- App-component mapping- Infrastructure remediation recommendations- Scalability planning |
| **FinOps** | - Joint cost analysis with Solution Architects |
| **DevOps Consultants** | - SDLC and CI/CD tooling review- Deployment architecture evaluation- DevOps maturity assessment and gap analysis |
| **ITIL Team** | - ITSM maturity and operations baseline review- ITSM tools comparison- RACI mapping- Design of Target Operating Model- Service architecture blueprinting |
| **Business Consultants** | - Review customer profile & business strategy |
| **Product Team** | - Cloud product portfolio evaluation |
| **HR / Org Analysts** | - Skills gap and certification analysis |
| **TBD / Cross-Team** | - Infrastructure EOL evaluation- Sovereign cloud roadmap alignment- Service management automation tools (e.g., ServiceNow, SIEM) |

## 2. Phase 0: Audit & Discovery

### 2.1 Objectives

📄 {TEXT\_PHASE\_0\_OBJECTIVE}

1. Build an accurate baseline of on-prem infrastructure and workloads
2. Identify licensing/compliance gaps
3. Model Total Cost of Ownership (TCO) and cloud suitability
4. Surface security risks and vulnerabilities

### 2.2 Activities & Deliverables

📊 {TABLE\_PHASE\_0\_TASKS}

Example

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Task** | **Goal** | **Tools** | **Duration** | **Deliverable** |
| Automated Discovery of Infra/Apps | Baseline all systems & dependencies | Flexera / Live Optics / RVTools | 2 days | Inventory & usage heatmaps |
| Software License & Compliance Audit | Identify over-/under-licensing | Flexera FNMS / Snow / SCCM | 2 days | Compliance report |
| TCO Modeling & Cloud Suitability | Compare on-prem vs. cloud costs | Flexera CloudScape / AWS Migration Evaluator | 2 days | 3- and 5-year TCO charts |
| Risk & Vulnerability Assessment | Surface security gaps & EOL issues | Qualys / Nessus / Flexera Secunia | 2 days | Risk matrix & remediation list |

## 3. Phase 1: On-Prem Assessment & Design

📄 {TEXT\_PHASE\_1\_OBJECTIVE}

### 3.1 Discovery

1. **Review business operations & technical environment**
2. **Inventory infra/apps/dependencies**
3. **Analyze networking, connectivity, use cases**
4. **Assess performance, security, storage, compliance**

### 3.2 Design

1. **DR & BCP requirements**
2. **Cloud architecture & networking blueprint**
3. **Monitoring, scaling & DevOps policies**
4. **Logging & observability integration**

### 3.3 Cost Analysis

1. High-level comparison (current vs. proposed)
2. Production & non-production baselines

### 3.4 Activities & Deliverables

📊 {TABLE\_PHASE\_1\_TASKS}

example

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Task** | **Goal** | **Team** | **Tools** | **Duration** | **Deliverable** |
| Review biz ops & tech environment | Understand current environment | Solution Architects | Workshops, Interviews, Excel | 2 days | Current state analysis doc |
| Build infra/app inventory | Document assets & deps | Solution Architects | Flexera/Live Optics/RVTools | 3 days | Asset & dependency matrix |
| Networking & connectivity review | Assess readiness | Solution Architects | Nmap, NetFlow, Visio | 2 days | Connectivity assessment report |
| Performance, security, storage review | Evaluate NFRs | Solution Architects | Zabbix, SolarWinds | 2 days | NFR evaluation checklist |
| Review emerging-tech use cases | Understand future needs | Solution Architects | Workshops, Gartner reports | 1 day | Emerging tech matrix |
| Design cloud architecture & networking | Blueprint target state | Solution Architects | Lucidchart, Terraform | 3 days | Cloud target architecture |
| Define DevOps, monitoring & logging policies | Standardize ops best practices | Solution Architects | Grafana, Prometheus, ELK | 2 days | DevOps & Observability policies |
| Cost analysis & comparison | Support budget planning | FinOps & Solution Architects | Flexera CloudScape, Excel | 2 days | TCO comparison report |

## Phase 2: Operational Excellence — Well-Architected Review

📄 {TEXT\_PHASE\_2\_OBJECTIVE}

Examples

### 4.1 Infrastructure & Network Assessment

1. Asset & server utilization
2. Network, backup & security architecture
3. App & component mapping

### 4.2 Remediation & Optimization

1. Connectivity & scaling improvements
2. Security posture strengthening
3. Consolidated remediation plan

### 4.3 Activities & Deliverables

📊 {TABLE\_PHASE\_2\_TASKS}

Example

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Task** | **Goal** | **Tools** | **Duration** | **Deliverable** |
| Asset & server utilization assessment | Optimize usage | Flexera/Live Optics/RVTools | 2 days | Utilization optimization plan |
| Evaluate network, security, backup arch. | Ensure compliance & reliability | Nessus, Veeam, firewall configs | 3 days | Reliability & compliance report |
| Application & component evaluation | Align infra to app needs | Dependency mapping tools | 2 days | App-to-host matrix |
| Security posture evaluation | Strengthen controls | IAM tools, CIS benchmarks | 2 days | Security controls assessment |
| Connectivity & scaling optimization | Enable cloud scalability | CloudWatch, auto-scaling | 2 days | Scalability roadmap |
| Provide remediation recommendations | Guide implementation | Jira, risk register | 1 day | Remediation playbook |

## Phase 3: GitOps / DevOps Assessment

📄 {TEXT\_PHASE\_3\_OBJECTIVE}

Example

1. **Review SDLC & CI/CD tooling**
2. **Evaluate deployment architecture**
3. **Identify automation gaps**

### 5.1 Activities & Deliverables

📊 {TABLE\_PHASE\_3\_TASKS}

example

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Task** | **Goal** | **Team** | **Tools** | **Duration** | **Deliverable** |
| Review SDLC & CI/CD tooling | Identify pipeline gaps | DevOps Consultants | GitLab, Jenkins, Azure DevOps | 2 days | CI/CD tooling gap report |
| Evaluate deployment architecture | Improve repeatability | DevOps Consultants | Helm, Terraform, Kubernetes | 2 days | Deployment architecture report |
| DevOps gap analysis & remediation plan | Raise maturity | DevOps Consultants | Jira, Confluence, maturity models | 2 days | DevOps maturity roadmap |

## 6. Phase 4: Sovereign Cloud Service Provider Assessment

📄 {TEXT\_PHASE\_4\_OBJECTIVE}

### Example

### 6.1 Customer Profile

1. Business size, industry, expansion plans

### 6.2 Product Portfolio

1. COLO, IaaS, PaaS, GPUaaS offerings
2. Self-service vs. managed

### 6.3 Ops & Service Mgmt

1. ServiceNow, SIEM, backup/monitoring tools
2. RPA, AI-Ops, SRE ambitions

### 6.4 People & Talent

1. Org structure, skills, certifications
2. Training & shift-coverage plan

### 6.5 Infrastructure & EOL Gear

* HW/SW stacks, capacity planning
* EOL component roadmap

### 6.6 Activities & Deliverables

📊 {TABLE\_PHASE\_4\_TASKS}

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Task** | **Goal** | **Team** | **Duration** | **Deliverable** |
| Review customer business profile & future plans | Align roadmap to strategy | Business Consultants / SA | 2 days | Strategic roadmap |
| Product portfolio evaluation | Define cloud product strategy | Solution Architects / Product Team | 2 days | Product strategy doc |
| Service Mgmt tooling review | Recommend automation & RPA/SRE | ITIL Team | 2 days | Tooling recommendations |
| Team structure, skills & certifications review | Assess readiness | ITIL Team / HR | 2 days | Skills gap & training plan |
| Evaluate current & future infra incl. EOL gear | Plan upgrades or reuse | Solution Architects | 2 days | Infrastructure rationalization report |

## 7. Phase 5: Service Management Assessment

📄 {TEXT\_PHASE\_5\_OBJECTIVE}

### Example

### 7.1 Operational Baseline

* Current challenges, objectives, constraints
* ITIL process maturity & tool comparison

### 7.2 Target Operating Model & Service Architecture

* TOGAF- and IT4IT-based design
* Governance, SLAs, detailed process flows
* ServiceNow integration plan

### 7.3 Activities & Deliverables

📊 {TABLE\_PHASE\_5\_TASKS}

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Task** | **Goal** | **Tools** | **Duration** | **Deliverable** |
| ITIL maturity & operations baseline assessment | Measure ITSM effectiveness | ITIL self-assessment tools | 2 days | ITIL maturity scorecard |
| Compare current ITSM tools & modules | Select best-fit platform | Tool demos, scoring matrix | 2 days | ITSM tool evaluation report |
| Role/responsibility mapping vs. ITIL | Align to ITSM best practices | Excel, process mapping | 1 day | RACI matrix |
| Design Target Operating Model | Build future-ready service model | PowerPoint, BPMN | 2 days | Target Operating Model |
| Design service architecture (people, tools, suppliers) | Enable integrated ITSM strategy | Lucidchart, CMDB inputs | 2 days | Integrated service blueprint |

## 8. Appendix

* **Full Task Matrix** (Excel spreadsheet)
* **Glossary of Terms & Tools**
* **Detailed Cost Models**

# 8. Phase 6: Migration‑Scenario Analysis & TCO Options ( out of current SOW scope)

### 8.1 Objectives

Catalogue migration paths for every workload (Retain, Retire, Rehost, Replatform, Refactor, Replace, Rearchitect).

Model multi‑scenario TCO (on‑prem, hybrid, cloud‑native) including CAPEX/OPEX, licences, staffing, carbon.

Assess risk, complexity and business value to score each option.

Group workloads into pilot and migration waves.

Prepare recommendation & sensitivity analysis for Steering Committee.

### 8.2 Activities & Deliverables

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Task | Goal | Team | Tools | Duration | Deliverable |
| Catalogue migration paths (7 Rs) | Identify viable options per workload | FinOps + Migration Architects | CloudScape, Azure Migrate | 2 d | Migration‑options matrix |
| Multi‑scenario TCO modelling | Compare cost across scenarios | FinOps | Excel Monte‑Carlo, CloudScape | 2 d | 3 & 5‑year TCO charts |
| Risk / complexity scoring | Prioritise by effort & risk | SA + Architects | CAST Highlight | 1 d | Risk‑complexity heat‑map |
| Define migration waves | Sequence low‑risk, high‑value first | Migration Architects | Jira, Excel | 1 d | Wave grouping plan |
| Steering Committee decision pack | Secure approval | FinOps + PMO | PowerPoint | 1 d | Executive paper & slide deck |

# 9. Phase 7: Programme Mobilisation & Minimum‑Viable Cloud Landing‑Zone Build ( out of current SOW scope)

📄 {TEXT\_PHASE\_7\_OBJECTIVE}

📊 {TABLE\_PHASE\_7\_TASKS}

### 9.1 Objectives

{TEXT\_OBJECTIVES}

Example

Mobilise the delivery programme and establish governance.

Set up secure, compliant Minimum‑Viable Cloud Landing Zone.

Validate guard‑rails with a pilot workload before mass migration.

### 9.2 Activities & Deliverables

📊 {EXCEL\_DELIVERABLE\_TRACKER}

Example

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Task | Goal | Team | Tools | Duration | Deliverable |
| Stand‑up programme governance | Define KPIs, risk/change control | PMO | Jira, Confluence | 2 d | Programme charter & RAID log |
| Decompose roadmap to backlog | Create work‑streams & sprints | PMO + Guild | Azure DevOps Boards | 2 d | Master backlog / sprint plan |
| Secure contracts & accounts | Ensure budget & access | Procurement + PMO | Smartsheet | 1 d | Signed contracts |
| Build MVC landing zone | Provide secure cloud foundation | Cloud Engineering Guild | Terraform, Ansible, Control Tower | 5 d | IaC repo & compliance report |
| Pilot workload migration | Validate patterns & hand‑off | Cloud Guild + Ops | CloudEndure, Jenkins | 2 d | Pilot runbook & lessons learned |

# 10. Team Roles & RACI

📊 {EXCEL\_RACI\_MATRIX}

# 11. Timeline & Milestones

{timeline-table}

📊 {IMG\_GANTT\_TIMELINE}

# 12. Assumptions & Dependencies

📄 {TEXT\_ASSUMPTIONS}  
📄 {TEXT\_DEPENDENCIES}

# 13. Acceptance Criteria

📄 {TEXT\_ACCEPTANCE\_CRITERIA}

# 14. Commercial Summary

📊 {EXCEL\_COST\_MODEL}  
📄 {TEXT\_PAYMENT\_TERMS}

# 15. Appendix

A. Glossary

{glossary-txt-table}

B. Tool Reference

{tools-table}