

PROJECT PROPOSAL

BTC ENTERPRISES

PREPARED BY CONESTOGA CONSULTANTS

## TABLE OF CONTENTS

<b>EXECUTIVE SUMMARY .....</b>	<b>3</b>
<b>INTRODUCTION.....</b>	<b>4</b>
<b>PROBLEM STATEMENT .....</b>	<b>4</b>
Communication.....	4
File Storage.....	5
Security.....	5
<b>OUR TEAM.....</b>	<b>6</b>
<b>APPROACH &amp; METHODOLOGY .....</b>	<b>6</b>
<b>PROJECT MILESTONES .....</b>	<b>6</b>
<b>TIMEFRAME &amp; DELIVERABLES.....</b>	<b>7</b>
<b>LOCATIONS.....</b>	<b>8</b>
<b>BUDGET .....</b>	<b>9</b>
<b>CLOSING .....</b>	<b>9</b>

## EXECUTIVE SUMMARY

BTC Enterprises (herein referred to as “the client”) has enjoyed steady growth since 1967 and recently expanded with acquisition of 2 companies. With this expansion the client has increased staffing to support multiple projects, human resources and technology initiatives. This growth has seen an increase in revenue however it has exposed challenges in communication between departments and individuals within it. This has been compounded by the client’s work from home initiative meant that many staff members no longer work at the head office or satellite locations, but from their home office. As a result, the client is undertaking the process of streamlining technologies using Cloud platforms to replace file storage, communications and email.

That is where our team come into action. We are a hard-working, passionate and dedicated crew of IT Consultants specializing in Cloud Solutions technology. We propose to take your existing communications network and move to an all-encompassing platform for not only File Storage, Email and Communication but to become inter-connected by department. By inter-connecting your departments we will build the Cloud-based platform that works from home, office or abroad. We will accomplish this by building a SharePoint experience that includes websites for the main company and each department.

## INTRODUCTION

Our client has gone through a period of growth leading to challenges with communication, file storage and security. The client has purchase licensing for M365 but are not familiar with the technology outside of using OneDrive and basic Office applications (Word, Excel and PowerPoint). To combat growth challenges and make sure of their latest technology purchase they are looking for a cloud-based technology solution.

That's where we come in. Conestoga Consultants are experience Cloud Technology Solutions specialists. In this proposal we will discuss the benefits of using the full suite of M365's platform to overcome your communication, file storage and security challenges. We then maximize the benefits of using M365 to streamline business operation, fully amalgamate under one corporate structure building a domain that is both easy to use and maintain.

Over the next several sections we will discuss the problems experience, a bit about our team and experience, how we approach projects such as yours, the main project milestones and the budget for this project.

## PROBLEM STATEMENT

The client is experiencing difficulty within three core areas of their business due to rapid growth and work from home strategies. These areas can be summarized as the following: communication, file storage and security. Each will be discussed in detail in the sections below.

### COMMUNICATION

Communication problems have been plaguing the client even pre-acquisition and before the Covid-19 pandemic. The client was a company of 1,250 employee prior to the acquisition of **PetChoice and DogsOnly** and now have more than 1,600+ employees. They relied mainly on communication through Skype for Business for internal instant messaging, email for company blasts / client communications and face-to-face communication for company projects. These methods will often overlap each other causing confusion between departments, individuals and occasionally clients. This is due to preference by individuals, rather than following official office policy. Regardless of policy, individuals will continue to use their preferred methods of communication leading to poor communication. Fast-forward to today, workers who work from home and others in the office are having difficulty performing to the best of their abilities. Office staff like to communicate face-to-face but many workers who are at home prefer using instant messaging over video conferences.

The newly acquired companies are hesitant to communication with head office and other employees. Private conversations have revealed that the newly acquired company employees are dissatisfied with the transfer of ownership. They don't like the way things are being ran and feel left out of key decisions and have started to ignore communications. This led directly to the **Mitchen Dog Toys contract** being cancelled due to client dissatisfaction with project management communication. The Project Manager could never get answers in real-time for questions by the client and opted out of the contract citing poor communication and customer service. This escalated further in the last corporate town-hall meeting when only a handful of team members from PetChoice and DogsOnly attended the webinar. The CEO was very upset with the lack of participation by the new acquisitions and requested a formal meeting with management that did not produce any meaningful change.

Clients have started to complain about the usage of two meeting softwares; WebEx and Zoom and have asked us to formally pick one. In more than one occasion one group of clients received a WebEx meeting from head office

and another Zoom meeting invite from DogsOnly. This confusion causes several key people to miss the meeting and the client to ask what is happening at BTC Enterprises. Reputation is very important to our client, and this must be resolved moving forward.

The CTO and CEO noticed that DogsOnly uses WordPress for their corporate intranet communications. When given an overview of all the pages and information stored within, they were very impressed. They want to re-use some elements of the WordPress site for the BTC Enterprises corporate intranet solution.

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## FILE STORAGE

File Storage has been an on-going issue within our client's structure. Pre-Coivd-19 files were stored on individual computers, network shared drives, storage drives and a small amount of cloud storage. This led to numerous occasions where files were out of date for projects, presentation documents were not the latest file, multiple financial documents being updated containing similar information and file loss when a computer hard drive failed. Retention policies do not exist today within the organization allowing for accidental deletion of files causing massive re-work initiates. Now with many employees working from home, access to specific files that are stored on network shared drives must be accessed through VPN but this has caused latency issues and access control issues. If multiple employees try to access the same file, copies have been created all over the drives. This is especially frustrating when employees leave for vacation and forget to close all of their files. Acquisition of other companies have not been fully amalgamated into formalized department structures leave multiple departments stored within their own network drives but are not accessible by head office. This is not reflective in their document storage. Files are stored in a non-discerning order, sensitive Human Resource documents are accidently being place in common storage locations and many users report difficulty with searching and finding documents.

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## SECURITY

Security is proving to be a very difficult area to manage for our client. Challenges are broken down into two main areas; **file security and individual user access**. In an attempt to improve file security, more folders and individual security were added to network shares. This became a large challenge to manage because the client does not use domain security for its main locations. This leads to a lot of individual maintenance of security permission with new employees onboarding and other employees leaving the company. It has been especially difficult managing and preparing company laptops for work from home employees. If a new employee needs rights or permissions added, they need to send the laptop back to head office for IT to update it. If an employee leaves the company, IT has to race to all network folders and start removing their permissions from each of the folders. This has led to some close-calls with disgruntled employees who could have caused major damage on their way out of the company. The client has met many times to discuss this issue and was the major catalyst for undertaking this project. Finally, it was discovered that DogsOnly has their own domain, this is leading to users being to be created in both the network for the main company and then within DogsOnly's domain. This is wasting IT resources that can be better utilized in other projects and initiatives.

It was recently discovered that many of the work from home employees have been allowing their children to use their corporate laptops. This has led directly to spyware being installed on one company laptop. IT is having a tough time locking down these machines since they are not all on the domain and permissions are often overridden to avoid laptops from being taken out of service.

Employees have recently asked for those who are starting to travel again to use their mobile devices to stay connected within the domain. This has been a challenge due to non-domain environment and our client is currently looking for solutions to allow their employees remote access while in-transit or away from the office.

## OUR TEAM

**Conestoga Consultants** is a lead Cloud-Services provider specializing in SharePoint migrations from On-Premise to Cloud Technologies. We started **our business in 2010 focusing on SharePoint technology for file storage and retention and have grown with SharePoint to become an all-in-one technical platform provider.** We are 25 employees who are passionate and dedicated to the success of your project including **project managers, business analysts, user experience designers, programmers, technical trainers and more.** We understand what it means to have difficulty with communications. Prior to starting Conestoga Consultants, our CEO worked in several large corporations and noticed two problematic issues in common; file storage and communication. Many organizations have more files than they know what to do with them and almost no one knows what file belongs to whom. Since 2010 we set out to correct that issue under-taking many successful implementations including with FrankColdSauce, HomeSoftware and LargeSoft industries.

## APPROACH & METHODOLOGY

Our consultant team will take the Scrum approach utilizing Agile methodology for this project due to many phases and on-going complexities. Agile benefits by allowing for a more iterative approach, focused on delivering sections of our solution at a time. Scrum will allow us to focus on key changes and prioritization of the most important tasks each week. **Our core team will consist of 5 major players include a project manager, business analysis and 3 IT technicians.** We will host frequent update meetings with the client that sources back to our project management software.

The client will receive major communications through email, face-to-face and video calls where necessary. Project Milestones will be outlined in our project plan and actioned against within our project management software. We will link or present reporting for each milestone to keep you the client updated as progression occurs. In the event an issue shall arise, we will update each milestone and contact major project stakeholders to ensure a decision is made to come up with a solution.

## PROJECT MILESTONES

Our client is looking for a Cloud Services Technology Platform that will cover the following objectives:

**Azure Active Directory (AD)** – our team will build a **Single-Sign On (SSO) service controlled through Azure AD.** This will allow for individuals to connect to any location within the organization under ONE sign-in account. AD will allow for creating role-based security within this organization. This will replace the DogsOnly domain and become the domain for the entire company. Management of this technology will be transferred during technical training with our client's IT department.

**Cloud Migration** – our team will come up with and execute a Cloud Migration plan that will move file storage from individual computers, network shares, storage drives and small cloud storage to SharePoint and OneDrive. Specifics for SharePoint will be discussed in the next project milestone. OneDrive will be broken out into individualize storage and broke-down by company and then department. Our team will work with your team to **find, organize, archive, purge and then migrate files to OneDrive based on company organizational hierarchy.**

Our team will identify and migrate databases from any existing systems to cloud platform where possible. In accordance with our client's requirements, all data will be stored in Canadian-owned data centres (residing in Canada).

**SharePoint Migration** – our team will setup, configure and build our client's new corporate intranet utilizing SharePoint Online services. SharePoint will replace the defacto WordPress company intranet website with a top-level site for the organization and sub-sites for each company beneath it along with sub-sites for each department. SharePoint includes many features that WordPress does not including Document Libraries, Lists, Workflows, Integration to AD and more! SharePoint will become the common Platform for our client's major day-to-day operations and activities. Corporate communication services we been enhanced through messaging apps such as blog posts and bulletins. Project Management team will take advantage of Project Sites to coordinate communications with team members and customers alike. SharePoint will improve document control through document retention policies, version control and access control of files. SharePoint will be used to reduce complexities of departments.

**Communications Platform** – our team will setup Microsoft Teams to become your organization's communication platform. This will connect with M365 allowing all members to communicate through instant messaging, voice and video chat and connection to OneDrive for Team document storage. Teams will then be configured for departments for ease of use, faster and clear communication. Corporate communication will be setup in the form of blog posts, bulletins and email using SharePoint sub-sites and Microsoft Exchange.

**Reporting & Automation** – our team will work with key stakeholders to ensure that proper reporting requirements at discovered, documented and reviewed. Reports will be created through Power BI and further enhanced by building dashboards. Once dashboards are created, our team will work to ensure that all key team members have shared access. Our team will work with individual departments to look for sources of automation and workflow improvements to automate specific tasks that are currently done manually.

**Technical Training and Support** – our team will ensure each member of your team will be trained on the baseline of SharePoint and it's features. Technical and job-specific training will be included to ensure each of your employees are full-trained and functional in SharePoint. Our team will prepare a comprehensive training manual for outline all details of your configuration. This document will also entail details on how to create, modify and remove sub-sites, users and more.

## TIMEFRAME & DELIVERABLES

Based on early evaluation and previous discussion we estimate this project will take approximately 6 months to complete. Described below is the breakdown of our time-line based on current evaluation information and subject to change dependant of changes of requirements.

**Project Planning (1 Month)** – Our team will meet with your team and come up with a comprehensive project plan covering all aspects of this project. Once produced, it will be sent to the client for review and approval. Client will be responsible for final sign-off before project will start.

**Design Planning (1 Month)** – Our team will work through and build designs to showcase with the client design options to ensure proper brand styling, colour themes and design expectations are met. Client must sign-off on design plans before anything is created.

**Solution Configuration (3 Weeks)** – Our team will **configure Azure AD, SharePoint, OneDrive and more based on project requirements.** This will be done in tandem with the next step (Content Migration). Client will be responsible for on-going maintenance, updates, configuration and upgrades upon completion of project. Client will be also responsible for any users, groups and security configuration once project is complete.

**Content Migration (3 Weeks)** – Our team will build a comprehensive Content Migration plan which includes **all file, web, data content from existing systems, company locations, cloud locations and migrate to both SharePoint and OneDrive.** Client will be involved directly with multiple meetings to ensure all content is covered. Our team will then execute this plan to perform the migration. Our client will be responsible for file storage maintenance, archiving, deletion and organization for files and folder structure once project is completed.

**Solution Design (2.5 Months)** – Our team will build out the SharePoint solution based on the design specifications for both **websites and reporting.** Each company and department will have their own sub-site. Upon completion User Acceptance Testing and Technical Training will commence. Client will be responsible for ensuring access to key staff members, training facilities and accessibility for training.

### **Delivery Phases**

As our client has many locations the focus will be on delivering our solution in three (3) phases. Please note that each phase will need a formal sign-off of approval before our team will move forward.

**Phase I: Active Directory, SharePoint Configuration and Content Migration.** Our team will focus on setting up the AD and SharePoint environment for the entire corporate structure. Then move onto the Content Migration for all departments to ensure all documents have been loaded into SharePoint, OneDrive, etc.

**Phase II: Single Department Beta.** Our team will focus in on a single-department to beta-test the SharePoint solution ensuring proper quality, usability, structure, and resources are working as intended.

**Phase III: Remaining Departments Onboarding.** Our team will then turn its attention to all other remaining departments to allow for smooth transition to SharePoint.

## **LOCATIONS**

Our client has the following locations

- Cambridge, ON – Data Center
- Cambridge, ON - PetChoice
- Kitchener, ON
- Kitchener, ON – Head Office
- Waterloo, ON
- Guelph, ON - DogsOnly
- Milton, ON
- Toronto, ON
- Toronto, ON
- Oshawa, ON

For implementation purposes we will start at the **Head Office location in Kitchener, ON and then move to the Data Center in Cambridge, ON.**



## BUDGET

The total cost for the project will be **\$160,000**. The breakdown is as follows:

Line Item	Cost
<b>Project Planning</b> <ul style="list-style-type: none"><li>• Meeting and collaboration with client</li><li>• On-going communications</li><li>• Connection to project management software</li></ul>	<b>\$50,000</b>
<b>Design Concept</b> <ul style="list-style-type: none"><li>• Design specifications meetings</li><li>• Design document creation and review</li></ul>	\$10,000
<b>Content Migration</b> <ul style="list-style-type: none"><li>• Content Migration Plan</li><li>• Client Meetings to review plan and content</li><li>• Content Migration execution</li></ul>	\$25,000
<b>Implementation</b> <ul style="list-style-type: none"><li>• Travel to and from on-site locations</li><li>• On-site review of existing documents, files, data and more</li><li>• On-site User Acceptance Training</li><li>• Technical Classroom training</li></ul>	\$75,000

## CLOSING

With M365 we will empower our client with the tools and capabilities of the M365 platform. Our client will be able to use a Single-Sign-On (SSO) Azure domain to access products and features of M365 avoiding the use of multiple logins. Security issues will be addressed through using the single-domain access with the availability of Multi-factor Authentication (MFA) for office, remote and mobile users. We will improve our client's communication by moving to Microsoft Teams to ensure all members of different teams and departments are on the same page. Finally, documents will be more accessible by taking advantage of SharePoint's document libraries and OneDrive. Storage will now be focused based on department or role within the organization allowing for better organization of documents, security, searchability, retention and sharing.