**Purpose of this template:**

This is an example of an exit document to send to customers after envisioning sessions have concluded. It summarizes the materials reviewed, application scenarios discussed and decided, and the next steps in the process.

Hi <**insert customer stakeholder names here**>,

First, thank you for joining us in these envisioning sessions and providing us with tons of insights and guidance to help us understand the application scenarios and determine the scope of the machine learning engagement.

This email is to summarize what we have discussed in these envisioning sessions, and what we have decided to work on in this ML engagement. With this email, I hope that everyone can be on the same page regarding the scope of this ML engagement, and the things we can do together beyond this ML engagement to empower <**Customer>** to be more successful in the future.

## Materials Shared with Microsoft

<**List materials shared with you here. The list below contains some examples. You will want to be more specific.**>

* Business vision statement
* Sample Data
* Customer’s current thinking on problem

The Microsoft team dived into the shared materials, with the help of <**Customer>** SMEs, to understand:

* How the current solution is built and implemented
* Provide details here about the current state of the customer’s systems and processes.

## Applications Scenarios that Can Help <**People**> Achieve <**Task**>

The following application scenarios were discussed:

### Scenario 1:

### Scenario 2:

<**Add more scenarios as needed**>

For each scenario, provide an appropriately descriptive name and then follow up with more details.

For each scenario, discuss:

1. What problem we heard from the customer
2. How we propose to solve the problem
3. Who would use the solution
4. What would it look like to use our solution? An example of how it benefits someone at the customer.

## Selected Scenario for this ML Engagement

Which scenario was selected?

Why did we choose this scenario over the others?

Is there any place for the other scenarios in future work with Microsoft? When will we revisit them / what conditions need to be met to pursue them?

## More Details of the Scope for Selected Scenario –

### What is in scope?

### What data is available?

### Which performance metric to use?

### Bar of performance metrics

## What’s Next?

### Legal document to be signed by both <**Customer**> and Microsoft

The sign-off of the Cloud Workload Acceleration Agreement (CWAA) by both **<Customer>** and Microsoft is the prerequisite for **<Customer>** to start sharing data with Microsoft team. We should aim to complete execution of the CWAA by **<DATE>**.

### Responsible AI Review

In addition, we will begin the Responsible AI review process during the feasibility study to identify and mitigate potential risks of the ML solution. This is an integral part of the engagement framework that helps ensure we responsibly develop and deploy ML solutions.

To help identify potential risks, stakeholders, and uses of the solution, we will complete the triage process and fill out a few documents concerning Responsible AI by the end of the feasibility study. An ethics committee will review our response to give us the greenlight to move forward with the engagement.

### Data Hack planned for <**DATE RANGE>**:

**Prerequisites for the Data Hack**:

* CWAA has been signed by both **<Customer>** and Microsoft.
* **<Customer>** onboarding process for Microsoft team members has been completed so that Microsoft team members have access to the necessary data and compute resources.

We are assuming that these two prerequisites have been met before **<DATE>**. If **<Customer>** has strong confidence that the onboarding process can be completed within 4 hours, we can relax the second prerequisite so that we can take the first day of the data hack to onboard Microsoft team members.

**Objectives of Data Hack**

This data hack will be <**X>-<Y>** days, not including the onboarding time. The purpose of the data hack is as follows:

* Ensure that Microsoft team can access the data and compute resources that are necessary for the ML feasibility study
* Ensure that the data provided by **<Customer>** is of quality and is relevant to the ML solution
  + If the data quality is bad, the negative impact on the ML model will be significant
  + If the data is not relevant, the risk that the ML model will not perform as well as expected will be high
* Make sure that the Microsoft team has a good understanding of the data
  + We will document the data dictionary for future references
  + We will explore the data to get good insights from the data

### Personnel Needed for Data Hack

* **<Customer>** IT for onboarding if onboarding happens in data hack week
* 1 Data engineer from **<Customer>**, who can help us understand the data ETL process
* Data scientists from both **<Customer>** and Microsoft
* Product owners from both **<Customer>** and Microsoft
* Others who are related, as needed.

### ML Feasibility Study till **<DATE>**

**Objectives**

The purpose of ML feasibility study is to use the data provided by **<Customer>** to build ML models, and to validate the hypothesis that we can build ML models that meet, or have the potential to meet, the performance expectation of **<Customer>** on the models. This is the prerequisite for both **<Customer>** and Microsoft to add engineering resources to this engagement to develop and deploy end-to-end solution in **<Customer>**’s production system, in a code-with mode.

**Timeline**

We would kick off the ML feasibility study right after the data hack. The ML feasibility study will be 4-8 weeks, depending on the complexity of the data and the models. **<DATE RANGE>** is a tentative timeline for ML feasibility study. There is some possibility that the deadline may be extended due to unexpected blockers we may encounter. Both **<Customer>** and Microsoft will reassess and agree on the updated timeline periodically based on the progress as we conduct the ML feasibility study.

**Personnel needed in ML feasibility study**

During the ML feasibility study, we are expecting 1-2 data scientists from **<Customer>** to code with Microsoft data scientists. We are also expecting the product owners of both parties to be deeply involved in the ML feasibility study so that they are aware of the progress and can help address the challenges we might face during the ML feasibility study.

We might also need data engineers in this ML feasibility study, to help the data scientists on getting the right data for machine learning.

**Light agile process during ML feasibility study**

We will follow a light version of agile process, for example, but not limited to, we will have sprint planning, daily standup, sprint demo, and we will use work item management system of the **<Customer>**’s choice and use git repository for code management and collaboration.

### Identifying engineering resources

## While the ML feasibility study is underway, both **<Customer>** and Microsoft need to identify engineering resources so that they are ready to start the code-with dev crew engagement to develop and deploy the end-to-end solution in **<Customer>**’s production system after the successful ML feasibility study.

## What’s After ML Feasibility Study

If both parties are satisfied with the model performance during the ML feasibility study, or both parties agree that the ML model shows promise to meet the performance expectation, after the ML feasibility study, both parties will invest engineer resources, to work together with the data scientists to build the end-to-end solution and deploy it in a production system so that the end users can use it in their business operations.

## Summary of Timeline

Below is a high-level summary of the upcoming timeline:

Discuss dates for CWAA signing, data hack, and feasibility study along with any to-do items such as starting responsible AI process, identifying engineering resources. We suggest using a concise bulleted list or a table to easily convey the information.