Microsoft

Microsoft

Statement of Work

Assistance for Office 365 Onboarding

Prepared for:	DeKalb County
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Introduction

This Statement of Work ("SOW") and any exhibits, appendices, schedules, and attachments to it are made under Letter Agreement No. DORV177-130782-149580 ("Work Order"), the terms of which are incorporated herein by reference, by and between DeKalb County ("Dekalb," "Customer," "you," or "your") and Microsoft Corporation ("Microsoft," "us," "we," or "our") or Microsoft's affiliate, and sets forth the services to be performed by us related to your Assistance for Office 365 Onboarding Project ("project"). This SOW, together with the Work Order, represents the complete baseline for scope, services, Deliverables, and acceptance applicable to this project. All changes to this document will be managed in accordance with the Change Management Process defined below. Any terms not otherwise defined herein will assume the meanings set forth in the Work Order.

This SOW and the associated Work Order expire thirty (30) days after their publication date unless they have been formally extended in writing by Microsoft.

This SOW describes the Microsoft Services Assistance for the Microsoft Office 365 multitenant service and does not include the purchase or activation of the Office 365 service, which must be purchased by the Customer through a separate order. The Office 365 Service is not customizable and cannot be modified beyond what is outlined in the Office 365 Service Descriptions. Prior to signing the Work Order that references this SOW, the Customer will have had an opportunity to review the latest Office 365 Service Descriptions. Microsoft strongly recommends that the Customer review those Service Descriptions with relevant internal stakeholders. The Customer acknowledges that the Service Descriptions meet or exceed the Customer's minimum requirements for the selected services.

1 Project Objectives and Scope

1.1 Introduction

DeKalb is undergoing on-premises Active directory consolidation and requires re-homing previously configured and migrated mailboxes to the new Active Directory forest. The goal of this project is to re-install required on-premises infrastructure in the new target AD forest to allow for seamless user transition from one forest to another while remining in the same tenant. Directory Synchronization, Active Directory Federation Services and Exchange hybrid will be re-installed/re-configured to accommodate new forest topology. Envisioned design is depicted in the diagram below:
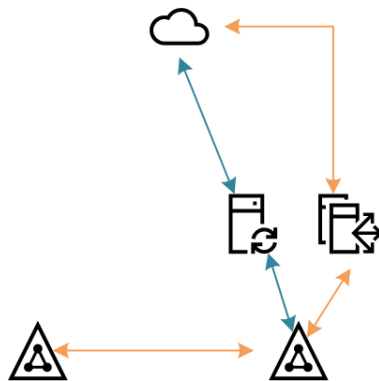
1.2 Objectives

The Assistance for Office 365 Onboarding Offer is a Microsoft Services engagement that provides additional planning, engagement management, and technical support for onboarding to Office 365.

The engagement will address the following workstreams:

Table 1: Overview of Office 365 Onboarding Activities

Office 365 Onboarding Activities
• Project management coordination and planning
• Office 365 Tenant Configuration and Technical Readiness
• Custom: Active Directory Synchronization Configuration Assistance
• Custom: ADFS: Configuration Assistance (Single-Site)
• Custom: Microsoft Exchange Hybrid Coexistence Configuration Assistance
• Setting up lab environment

1.3 Areas Within Scope

The Assistance for Office 365 Onboarding engagement components and scope are specified in the following table.

1.3.1 Assess Phase

Table 2: Assess | Project Management Assistance for Onboarding

Project Management Assistance for Onboarding	
Scope	Microsoft Services will provide project management support for assess phase activities as per the timeline in Section 2.2.
Assumptions	• The Microsoft Services Project Manager will manage the Microsoft Services resources and activities. • The Microsoft Project Manager will work with the Customer's Project Managers to integrate Microsoft activities into the Customer's onboarding project plan.
Microsoft Responsibilities	Microsoft Services will: • Generate the kick-off presentation, including the workshop agenda. • Facilitate the scheduling of workshops and Q&A sessions with Customer resources. • Conduct the project kick-off meeting, workshops, and Q&A sessions. • Based on actions, problems, and risks captured during the kickoff meeting or workshop sessions, update the RAID log and review with the Customer. • Discuss and document the Conditions of Satisfaction (Customer success plan) for the project to define critical success factors. • Create the draft project status report to review with the Customer's Project Manager and refine as necessary based on their input. • Generate the draft project plan, including key activities, milestones, dependencies, and durations, and review with the Customer's Project Manager for updates. • Create risks, actions, problems, decisions ("RAID") log and review with the Customer. • Create a project status report template.
Customer Responsibilities	The Customer will: • Provide Project Manager or Program Manager resources to work with the Microsoft Project Manager, and provide accountability and resource management of Customer resources for prioritization and completion of remediation and enablement activities. • Assist in scheduling team members for workshops and Q&A sessions facilitated by the Microsoft project team (including reservation of conference room, setup of the conference call, and other related activities). • Review the RAID log with the Microsoft Project Manager and confirm that appropriate resources are assigned to actions, problems, and risks and that team members are aware of target completion dates. • Assist in development of project communication matrix.

Project Management Assistance for Onboarding	
	• Provide templates or review existing templates for weekly status reports and steering committee reports.
	• Provide subject matter experts ("SMEs") who have technical and business knowledge about the Office 365 project, can attend the kick-off meeting and workshops, and can:
	o Supply the Microsoft Services teams with detailed environmental configuration information for in-scope Assessment Workshops.
	o Provide Customer requirements related to service features and make decisions about Office 365 deployment options.
	o Serve as a key point of contact within the Customer's environment for specific workloads that have been defined in the Assessment Workshops.
	• Assist in the draft Project Plan update, assigning team members to tasks, prioritizing work, and providing freeze dates, milestone target dates, or other constraints that will affect the overall timeline.
Exit Criteria	• Conditions of satisfaction are documented.
	• The draft project plan is agreed to by the Customer and Microsoft.
	• Initial onboarding RAID log has been generated and provided to the Customer.

Table 3: Assess | Office 365 Onboarding Assessment and Deployment Planning Workshops for Selected Onboarding Activities

Office 365 Onboarding Assessment and Deployment Planning Workshops for Selected Onboarding Activities	
Scope	• Lead an assessment and configuration workshop for each in-scope Office 365 activity that is listed within the initial Table 1: Overview of Office 365 Onboarding Activities. Each workshop will be no longer than two (2) hours.
	• Update the Remediation Checklist with identified remediation activities.
Assumptions	• In-scope enhanced onboarding enablement assessments will be scheduled to occur at a mutually agreed-upon time that may not occur within the first (2) two weeks of the project.
	• If the expected effort or duration of the remediation activities defined in the Assess Phase exceeds either the effort or duration allocated in Section 1.3.2, the Remediate Phase, the change management process in Section 2.4.3 will be used to adjust the project scope, timeline, and cost, as needed.
Microsoft Responsibilities	Microsoft Services will:
	• Deliver configuration assessment workshops to provide a high-level overview of the Office 365 enablement activities and identity remediation and enablement requirements for the Customer's Office 365 re-deployment.
	• Provide server-sizing recommendations when applicable.
	• Update the Remediation Checklist.
	• Work with the Customer to prioritize, assign, and plan the remediation activities that will be required for the Office 365 deployment program.
Customer Responsibilities	The Customer will:

Office 365 Onboarding Assessment and Deployment Planning Workshops for Selected Onboarding Activities	

	• Provide Project Manager or Program Manager resources to manage the Customer's Office 365 deployment program and provide accountability for prioritization remediation checklist items and completion timelines.
	• Provide SMEs who have technical and business knowledge about the Office 365 project, can attend the kick-off meeting and workshops, and can:
	   o Supply the Microsoft Services teams with detailed environmental configuration information for in-scope assessment workshops.
	   o Provide Customer requirements on service features and make decisions about Office 365 deployment options.
	   o Serve as a key point of contact within the Customer environment for specific workloads that have been defined in the Assessment Workshops.

Exit Criteria	• The Remediation Checklist has been updated.

1.3.2   Remediate Phase

Table 4: Remediate | Project Management Assistance for Onboarding

Project Management Assistance for Onboarding	
Scope	Microsoft Services will provide project management support for Remediate Phase activities as per the timeline in Section 2.2.
Assumptions	• The Customer will proactively work toward completion of remediation activities within the time frame described in Section 2.2. • If the defined duration of the Remediate Phase has ended without all blocking remediation problems being mitigated, or if the updated project plan results in changes to the project scope or timeline, the change management process in Section 2.4.3 will be used to adjust the project scope, timeline, and cost, as needed.
Microsoft Responsibilities	Microsoft Services will: • Schedule and facilitate a review of the draft Project Plan and Remediation Checklist with the project team. • Work with the Customer to update the project plan to refine the remediation, enablement, and onboarding activities and timelines. • Facilitate Remediation Checklist review meetings with the Customer to track the activity status, prioritization, and completion timelines for items on the remediation checklist and in the RAID log. • Provide an updated Project Plan that reflects the anticipated activities and schedule to complete the project.
Customer Responsibilities	The Customer will: • Provide Project Manager or Program Manager resources who will manage the Customer's remediation activities that are defined in the Remediation Checklist. • Provide technical leads for the remediation areas that are defined in the Remediation Checklist.

Project Management Assistance for Onboarding	
	• Assist in facilitating Remediation Checklist review meetings, validating completion of work, and assigning work to be completed in accordance with the Project Plan. • Provide an initial End-User Communications Plan to Microsoft for review. • Revise the project plan with updates to project activities and status received from project team members. • Assist in facilitating a weekly project status review meeting, including regular maintenance and updates to the RAID log (which will be part of the project status report). • Assist in facilitating biweekly steering committee meetings with project stakeholders and Customer leadership.
Exit Criteria	• The configuration and remediation activities that were documented in the Remediation Checklist have been completed, or the defined duration of the Remediation Phase has been expended.

Table 5: Remediate | Office 365 Technical Remediation Assistance

Office 365 Technical Remediation Assistance	
Scope	• Work with the project team to prioritize and plan remediation activities for the project. • Work at the Customer's direction to provide up to forty-eight (48) hours of technical guidance and assistance for activities that have been documented in the Remediation Checklist.
Assumptions	• The Customer has agreed on a time frame for completion of remediation activities as described in Section 2.2. • If the defined duration of the remediation period has ended without all blocking remediation problems being mitigated, the change management process in Section 2.4.3 will be used to adjust the project scope, timeline, and cost, as needed.
Microsoft Responsibilities	Microsoft Services will: • Provide technical guidance and assistance on remediation activities.
Customer Responsibilities	The Customer will: • Provide Project Manager or Program Manager resources who will manage the Customer's remediation activities that are defined in the Remediation Checklist. • Provide technical leads for the remediation areas that are defined in the Remediation Plan. • Provide SMEs with technical and business knowledge about the Office 365 project who can provide requirements for configuration of in-scope Office 365 services.
Exit Criteria	• The configuration and remediation activities that were documented in the Remediation Checklist have been completed, or the defined duration of the Remediate Phase has been expended.

Table 6: Remediate: Lab environment configuration assistance

Lab environment configuration assistance

Scope	*The following scope is limited to eighty (80) hours of support over a period of four (4) weeks.*
	Microsoft Services will:
	• Configure a Customer-provided Office 365 tenant for exclusive use in the Customer's lab or reference environment; this tenant will be distinct from a Customer production tenant.
	• Help perform Active Directory remediation activities in the lab or reference environment as required for Office 365 service implementation.
	• Verify that Customer network remediation for the lab or reference environment has been implemented and tested successfully.
	• Configure an AD FS provider for single sign-on.
	• Deploy the Microsoft Online Services Directory Synchronization tool and Exchange Server 2013 or 2016 hybrid deployment in the Customer's existing reference environment through the use of:
	   – A single Directory Synchronization tool server.
	   – An Exchange Server 2103 or Exchange 2016 hybrid configuration.
	• Migrate up to ten (10) test mailboxes from the reference environment into a test Office 365 tenant through an Exchange Server 2103 or Exchange 2016 hybrid deployment.

Assumption	When made available for configuration, the lab services will be functional, in good working order, and require no additional troubleshooting.
Microsoft Responsibilities	Microsoft Services will: • Work with the Customer to configure the in-scope lab or reference environments. • Define test cases and conduct validation testing in the lab or reference environments.

Customer Responsibilities	• The Customer has, or will acquire, a public Domain Name System ("DNS") domain to be used for the reference environment. This domain must be different from production domains.
	• The Customer will provide a fully deployed lab or reference environment that includes:
	   – A test Active Directory forest. Note that this forest should not have been created by cloning the production forest (that is to say, adding domain controllers, isolating them in a lab, and performing metadata cleanup on them) but as a brand new forest.
	   – Exchange Server 2013/ or Exchange 2016 that is deployed with at least one (1) client access server and one deployed mailbox server role (these two roles can be combined in a single server).
	   – Independent Internet access that systems in the reference environment can use to access the Internet to perform functions such as publishing selected systems online through network address translation, reverse proxy, etc. We currently estimate that we will need up to three public IP addresses (this requirement will be revised during the course of the project).
	   – Servers or virtual machines that are available to install synchronization and authentication services.

Lab environment configuration assistance	
	• The Customer has, or will acquire, an Office 365 tenant and associated licenses that will be dedicated exclusively to the reference environment. • The Customer has, or will acquire, required public certificates (for federation, Exchange Hybrid, autodiscovery, etc.) that will be dedicated exclusively to the reference environment. • The Customer will provide subject matter experts who have technical and business knowledge of the Customer's environment. • The Customer will work with Microsoft Services to accomplish in-scope activities.
Exit Criteria	The lab environment has been configured or the allocated hours have been expended.

1.3.3   Enable Phase

Table 7: Enable | Project Management Assistance for Onboarding – Enable

Project Management Assistance for Onboarding	
Scope	Microsoft Services will provide project management support for Enable Phase activities as per the timeline in Section 2.2.
Assumptions	• The Customer will proactively work toward completion of enablement activities within the time frame described in Section 2.2. • If the defined duration of the Enable Phase has ended without enable activities being completed, or if the updated project plan results in changes to the project scope or timeline, the change management process in Section 2.4.3 will be used to adjust the project scope, timeline, and cost, as needed.
Microsoft Responsibilities	Microsoft Services will: • Facilitate project status meetings with the project team to track the activity status, prioritization, and completion timelines for project work items and active RAID log entries. • Generate a weekly project status report and facilitate weekly project status review meetings with the project team. • Provide guidance on end-user readiness and support during onboarding for in-scope services when applicable.
Customer Responsibilities	The Customer will: • Provide Project Manager or Program Manager resources who can manage the Customer's enablement activities. • Provide technical resources to implement required on-premises and service configurations for service enablement. • Create a service test plan that contains Customer use cases, test cases, and expected results to be validated by the project team. • Provide resources for implementation of the test cases to evaluate service readiness, track problems, and work toward resolution.

Project Management Assistance for Onboarding	
	• Validate and track to completion the test plan and results, and engage team members as necessary to resolve open problems.
	• Facilitate the scheduling of any training sessions and track to completion.
	• Update Project Plan with communications and training plans, along with updates received from team members.
	• Assist in facilitating a weekly project status review meeting, including regular maintenance and updates to the RAID log (which will be part of the project status report).
Exit Criteria	In-scope activities for the Enablement Phase are complete, or the defined duration of the Enable Phase has been expended.

Table 8: Enable | Office 365 Tenant Configuration and Technical Readiness

Office 365 Tenant Configuration and Technical Readiness	
Scope	• Provide technical assistance to help the Customer to review and prepare their Office 365 tenant for re-alignment with on-premises directory migration.
	• Provide guidance on technical resource readiness for ongoing support of in-scope services.
Assumptions	The Office 365 tenant adjustments and configuration activities will be completed within a one (1)-week period.
Microsoft Responsibilities	Microsoft Services will: • Provide guidance to the Customer on technical resource readiness needed for on-premises directory migration. • Provide architectural and technical assistance that is specific to the on-premises and Office 365 environment and supports required configuration changes. • Configure the Customer's Office 365 tenant with a configuration that maps to new directory topology.
Customer Responsibilities	The Customer will: • Provide Project Manager or Program Manager resources who can manage the Customer's enablement activities. • Provide technical leads who can provide service usage requirements that will be used for the base tenant configuration. • Provide technical resources to implement required on-premises and service configurations for service enablement. • Provide licenses for Office 365 tenant creation if the Customer has not already provisioned their tenant.
Exit Criteria	Office 365 tenant is configured and available for use with newly created on-premises directory.

Table 9: Enable | Active Directory Synchronization Configuration Assistance

Active Directory Synchronization Configuration Assistance	
Scope	Microsoft Services will:

Active Directory Synchronization Configuration Assistance

	• Reconfigure/re-install a single instance of Microsoft Azure Active Directory Connect. • Configure Azure Active Directory Connect to synchronize up to two Active Directory Domain Services ("AD DS") forest(s) with a single previously synchronized Azure Active Directory and Office 365 tenant, allowing for seamless transition between on-premises directories. • Test synchronization by reviewing the event log of the Azure Active Directory Connect tool.
Assumptions	• The Customer's Active Directory implementation is functional, ready for synchronization, and requires no additional troubleshooting. • Duplicate user objects will be provisioned as multiple Office 365 users.
Microsoft Responsibilities	Microsoft Services will: • Install and configure Microsoft Azure Active Directory Connect. • Work with the Customer to validate synchronization functionality through review of Azure Active Directory Connect logs. • Provide guidance to the Customer regarding directory changes that may be required to complete a full synchronization.
Customer Responsibilities	The Customer will: • Provide a preconfigured physical or virtual server that is available for Azure Active Directory Connect installation with network access to Office 365 and Azure Active Directory. • Provide a Microsoft SQL Server instance that can be used as part of the Azure Active Directory Connect installation if necessary. • Provide administrative access to in-scope directories to facilitate Azure Active Directory Connect installation. • Determine what synchronization configurations will be required for object filtering. • Implement synchronization requirements that were identified during the Assess Phase. These would include network connectivity, trusts, and required access. • Make recommended changes to the directory to accomplish a full synchronization.
Exit Criteria	Azure Active Directory Connect has been re-installed/re-configured and in-scope directories have been synchronized with Office 365 allowing for seamless transition between on-premises directories.

Table 10: Enable | Single-Site Active Directory Federation Services Configuration Assistance

Single-Site Active Directory Federation Services Configuration Assistance

Scope	Microsoft Services will: • Install and configure a single local domain authentication AD FS farm with pre-exiting previously configured Office 365 service in a single-site configuration. • Configure federated sign-on for up to three (3) forests.

Single-Site Active Directory Federation Services Configuration Assistance	
	• Provide trust configuration guidance as it pertains to cross-forest authentication suitable for forest to forest account migrations. • Test federated sign-on functionality for up to ten (10) pre-exiting Office 365 service users per connected forest.
Assumptions	• AD FS infrastructure will be configured to use a Windows Internal Database. • The Customer environment can support deployment of AD FS Internet-facing servers (that is, proxy servers or web application proxy servers) in the perimeter network to support this service. • The Customer environment supports the ability to configure hardware load balancing for the proxy and back-end servers that have been identified for AD FS deployment, on both the internal network and the perimeter network. • The user principal name ("UPN") namespaces that are used for authentication are publicly addressable, and user objects in the Active Directory forests have their UPNs populated with the desired value. • The UPN namespace spanning between two forests will only be used for the duration of migration and will not persist after the completion of the project. • Federated authentication, as it relates to the Office 365 service, is understood by the Customer. • If account lockout is activated, the Customer has implemented authentication policies that help prevent accidental account lockouts when federated authentication is made available on the Internet. (AD.Lockout should be larger than ADFS.Lockout.) • AD FS can be used for federated sign-on for multiple forests, but it requires bidirectional forest trusts and that authentication namespaces be unique between forests.
Microsoft Responsibilities	Microsoft Services will: • Install and configure a single-site AD FS farm. • Work with the Customer to test federated sign-on functionality in the context of AD accounts being migrated from source forest to the target forest. • Provide guidance to the Customer regarding server and network configurations.
Customer Responsibilities	The Customer will: • Make required networking configuration changes and publish AD FS to the Internet. • Provide the required server instances for AD FS installation and configuration. • Provide load balancing for the AD FS servers.
Exit Criteria	AD FS has been connected to Office 365 and is production-ready serving users during forest-to-forest account migrations.

Table 11: Enable | Microsoft Exchange Hybrid "Light" Configuration Assistance

Microsoft Exchange Hybrid Coexistence Configuration Assistance	
Scope	Microsoft Services will: • Configure up to two Microsoft Exchange Server 2010 Service Pack 3 (SP3), Microsoft Exchange Server 2013, or Microsoft Exchange Server 2016 client access

1.3.4 Onboard/Migrate Phase

1.3.5 Training and Knowledge Transfer

Training during this engagement is limited to informal knowledge transfer—defined as Customer employees, associates, or contractors working side by side with Microsoft Services personnel—and can include activities such as:

- Whiteboard discussions.
- Email threads.
- Conference calls.
- Facilitated meetings on technical topics.

Knowledge transfer activities are secondary to completing deliverables and maintaining project schedules. No formal deliverables or meeting summaries will be provided for these sessions or activities.

1.4 Areas Out of Scope

Any area that is not explicitly listed in Section 1.3 as within scope is out of scope for this engagement. The areas that are out of scope for this engagement include, but are not limited to, the following:

- Modifications to the Office 365 Service beyond the configurable options.
- Management of end-user and organizational communications, documentation, training, and change management processes.
- Help-desk documentation and training.
- Formal user training (such as workshops, classroom, and books) or development of custom training courses or materials, except as explicitly defined as in scope.
- Producing Customer-specific reports, presentations, or meeting minutes.
- Pre-work that is required at the Customer's site.
- Architectural and technical documentation that is specific to the Customer, except as explicitly defined as in scope.
- Design, procurement, installation, and configuration of hardware and networking.
- Procurement, installation, and configuration of software, except as explicitly defined as in scope.
- Configuration, packaging, and distribution of client software that is required for the Office 365 service.
- Management, configuration, and activation of mobile devices.
- Applying security policies on mobile devices.
- Implementation of network configuration, analysis, bandwidth validation, testing, and monitoring.
- The technical change management approval process and production of supporting documentation.
- Rationalization and definition of group policies for user, workstation, and server management.
- Modification of a current operational model and Operation Guide.

- Cobranding of Office 365 user interfaces.
- Decommissioning and removal of on-premises environments (such as messaging and collaboration).
- Construction and maintenance of the Customer test environment, except as explicitly defined as in scope.
- Installation of service packs and any required updates on infrastructure servers.

2 Project Approach, Estimated Timeline, and Deliverables

2.1 Approach

During the engagement, the Microsoft Services delivery team will help the Customer work with FastTrack and provide technical and project management assistance working alongside the Customer to complete the Office 365 Onboarding project. The Microsoft and Customer responsibilities described in the in-scope activities (Section 1.3) will be run in distinct phases. The below graphic provides a summary of the high-level activities that will be performed during each phase of the standard approach. Some activities that are depicted might be not be in the scope of this project based on the scope defined in Section 1.3.

2.2 Estimated Timeline

It is estimated that this engagement will be performed according to the following timeline and will include the phases and milestones noted. The actual timeline for this engagement will be relative to the project start date, and all dates and durations provided are estimates only.
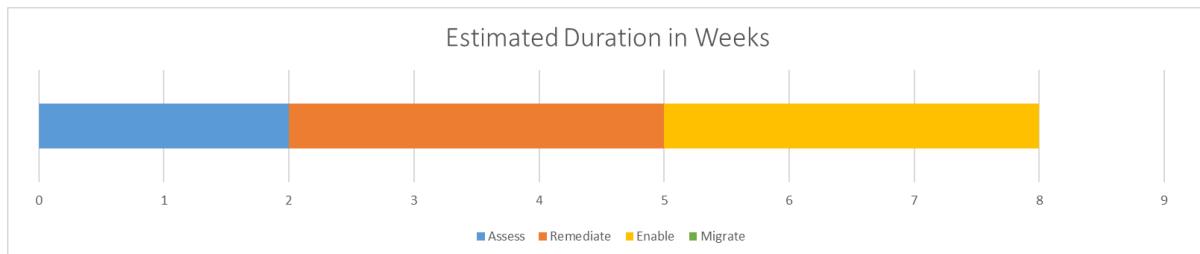
2.3 Key Deliverables and Acceptance Process

2.3.1 Key Project Deliverables

The following is a list of the key project service deliverables that will be produced within the scope of this SOW. Deliverable with "Acceptance required?" equal to "Yes" must be formally reviewed and accepted under the process described in Section 2.3.2.

Project Phase	Deliverable	Deliverable Description	Acceptance Required?
Assess	Remediation Checklist	A Microsoft Excel workbook that lists the Customer-owned activities that are required to address any implementation blockers identified in the Assess Phase that might prevent Office 365 enablement.	No
Enable	Service Provisioning Sign-Off Document	A document that shows Customer's acceptance of that all in-scope online services have been provisioned for Customer's consumption.	No

Note: No deliverables are associated with assistance, discussions, advice, guidance, or project status reporting.

2.3.2   Deliverable Acceptance Process

During the project, Microsoft will submit completed project deliverables for the Customer's review and approval.

The Customer's use or partial use of a deliverable will constitute acceptance of that deliverable. The Customer may provide its acceptance or rejection of deliverables electronically through email.

Within three (3) business days of the date of submittal, the Customer is required to:

- **Accept the deliverable** by signing, dating, and returning a deliverable acceptance form, which can be sent by email, or by using (or partially using) the deliverable;

<div align="center">Or</div>

- **Reject the deliverable** by notifying Microsoft in writing; the Customer must include a complete list of reasons for rejection.

Deliverables shall be deemed accepted unless the written rejection notification is received by Microsoft in the timeframe specified.

If a rejection notification is received, Microsoft will correct problems with a deliverable that are in scope for the project (and documented in this SOW), after which the deliverable is deemed accepted.

Problems that are outside the scope of this SOW, and feedback provided after a deliverable has been accepted will be addressed as a change request, managed as described in the Change management process in Section 2.4.3.

2.4 Project Governance

2.4.1 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, the acceptance of deliverables, and review open problems and risks.

2.4.2 Risk and Issue Management

The following general procedure will be used to manage active project problems 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 problems and risks will be regularly monitored during the project.

2.4.3 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:
  - o A description of the change.
  - o 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 three business days to confirm the following to Microsoft:
    - *o* Acceptance—the Customer must sign and return change request form.
    - *o* Rejection—if the Customer does not want to proceed with the change or does not provide an approval within three business days, no changes will be performed.

2.4.4   Executive Steering Committee

The Executive Steering Committee provides overall senior management oversight and strategic direction for the project. The Executive Steering Committee for the project will meet per the frequency defined in the communication plan and will include the roles listed in the following table. The responsibilities for the committee include:

- Making decisions about project strategic direction.
- Serving as a final arbiter of project problems.
- Approving significant change requests.

Role	Organization
Project Sponsor	Customer
Delivery Manager	Microsoft

2.4.5   Escalation path

The Microsoft Project Manager will work closely with the Customer's Project Manager, Sponsor, and other designees to manage project problems, 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
- Executive Steering Committee

2.5   Project Completion

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* **Section 2.4.3,** will be followed and the contract modified. The project will be considered complete when at least one (1) 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.

3 Project Roles and Responsibilities

3.1 Customer Roles and Responsibilities

Customer Role	Responsibilities
Customer Project Sponsor	• Makes key project decisions. • Serves as an escalation point for unresolved problems and clears project roadblocks. • Confirms that the proper funding and support are provided for the success of the project. • Acts as the overall escalation point for change and issue management. • Acts as an advocate for user and internal communications.
Customer Project Manager	• Functions as the primary point of contact for the Microsoft team for each assigned workstream. • Is responsible for managing and coordinating the overall project. • Is responsible for resource allocation, risk management, project priorities, and communication to management. • Manages day-to-day project activities. • Manages the project risks and problems register. • Coordinates team activities to provide deliverables according to the project schedule. • Creates the End-User Communications Plan. • Organizes training.
Client Infrastructure Lead	• Participates in workshop discussions and drives activities that address client configuration for online service consumption. • Helps the Microsoft team complete the client infrastructure implementation activities.
Communications and Training Lead	• Is responsible for Customer communications related to the move to Office 365. • Is responsible for identifying and planning Customer training requirements related to the move to Office 365.
Identity Lead	• Is responsible for the current directory implementation. • Participates in workshop discussions and is responsible for directory-related activities including acquisition and configuration of required hardware and implementation of the user-provisioning approach.
Messaging Lead	• Is responsible for the current messaging infrastructure and integrating the Office 365 messaging environment on behalf of the Customer. • Participates in workshop discussions and is responsible for activities that address email readiness including installation and implementation of messaging environment discovery tools, if necessary.
SharePoint Lead	• Is responsible for the current collaboration infrastructure and integrating the Office 365 SharePoint environment on behalf of the Customer. • Participates in workshop discussions and is responsible for activities that address SharePoint readiness, including installation and implementation of SharePoint environment discovery tools, if necessary.

Customer Role	Responsibilities
Skype Lead	• Is responsible for the current instant messaging infrastructure and integrating the Office 365 Skype environment on behalf of the Customer. • Participates in workshop discussions and is responsible for activities that address Skype readiness, including installation and implementation of Skype environment discovery tools, if necessary.
Migration Lead	• Participates in workshop discussions and is responsible for migration schedule activities, including end-user migration groups, scheduling, and communications.
Network Lead	• Provides information about current network structures and datacenters. • Participates in workshop discussions and is responsible for network-related activities, including network bandwidth requirements, network performance testing, and required updates to DNS or Dynamic Host Configuration Protocols, firewalls, and IP addresses.
Operations Lead	• Provides daily support that is related to ongoing system management and recovery. • Is responsible for creating policies and operational models for the new architecture. • Creates Operational Guides for the new environment.
Security Lead	• Participates in workshop discussions and drives activities that address client configuration for online service consumption. • Assists the Microsoft team in implementing the security-related enablement activities.
Service Desk Lead	• Is responsible for problem resolution and first-level incident management when the system is in production.

3.2   Microsoft Roles and Responsibilities

Microsoft Role	Responsibilities
Microsoft Delivery Manager	• Is responsible for the deliverable quality and overall delivery of Microsoft's Services. • Serves as single point of contact for escalations, billing problems, personnel matters, and contract extensions. • Facilitates project governance activities and leads the executive steering committee.
Microsoft Services Project Manager	• Serves as single point of contact for Microsoft Services project status. • Manage and coordinate Microsoft project delivery. • Take responsibility for issue and risk management, change management, project priorities, status communications, and status meetings. • Coordinate Microsoft Services, Microsoft FastTrack and Microsoft subcontractor resources but not Customer's resources.
Microsoft Services Deployment Consultant	• Participates in workshop discussions and contributes to the Customer Remediation Checklist and Deployment Plan. • Completes the Service Enablement Plan with the Customer to facilitate service consumption.

Microsoft Role	Responsibilities
	• Provides technical and architectural subject matter expertise that can be used to complete remediation activities. • Implements the on-premises configuration that is required for Office 365 services.
Microsoft Services Architect	• Provides technical and architectural oversight for the overall Office 365 deployment program. • Provides subject matter expertise for complex configuration requirements that are related to the Office 365 deployment.
Microsoft FastTrack Manager	• Serves as primary point of contact for FastTrack activities. • Remotely participates in the project kick-off. • Contributes to project management plans, project status reports, and project performance reports. • Is responsible for FastTrack resource allocation, risk management, and project priorities. • Works with the Microsoft Services Project Manager to manages day-to-day FastTrack activities for the project.
Microsoft FastTrack Engineer	• Remotely leads the FastTrack Assessment Workshop and discussions about FastTrack activities. • Documents Remediation Checklist and the deployment plan implementation activities. • Provides remote technical guidance regarding Office 365 remediation and service implementation activities that are provided by FastTrack. • Assesses migration readiness and participates in planning workshops.
FastTrack migration team	Remotely conducts data migration.

4 General Customer Responsibilities and Project Assumptions

4.1 General Customer Responsibilities

In addition to any Customer activities identified elsewhere in this SOW, the Customer will:

- Provide suitable work spaces with desks, chairs, telephones.
- Provide LAN connections that give the Microsoft onsite team access to the Internet and email.
- Provide access to necessary Customer work sites, systems logons and passwords, and material and resources as needed and as advised by us in advance.
- Assume responsibility for management of all vendors who are not managed by Microsoft.
- Provide access—with proper licenses—to the tools and third-party products that the Microsoft team needs to complete its assigned tasks.
- Facilitate the change management process, when necessary, to enable required changes to the Customer environment.
- Acquire and install the appropriate server capacity that is required to support the environments as defined in the scope section of this SOW at least two (2) weeks prior to the start of work on the scope as defined in the Project Plan.
- Throughout the project, Microsoft will submit requests for decisions or feedback for the Customer to complete. Decisions are assigned due dates, and it is assumed that the Customer will provide the required feedback or make decisions on either the due date agreed upon or within three (3) business days of submittal. If a decision or feedback is not provided by the due date or within three (3) business days, it will be addressed as a potential change of scope pursuant to the change management process outlined in this SOW.

4.2 Project Assumptions

All estimates regarding fees, timelines and our detailed solution are based on information that is provided by the Customer to date, known documented requirements, and assumptions that are listed in this document being validated as true during this project. They are also based on the Customer and Microsoft working in partnership, as described within the approach and governance sections of the document. Anything that differs materially regarding the information provided, approach, governance, or assumptions, can result in Microsoft raising a change request to cover additional work or extended durations as a direct result.

The Services, fees, and delivery schedule for this project are based on the assumptions described in the following table.

Component	Assumptions

General Assumptions	• In performing services under this SOW and the applicable Work Order, Microsoft will rely upon any instructions, authorizations, approvals, or other information provided by the Customer Project Manager or personnel duly designated by the Customer's Project Manager.
	
	• If the project schedule requires Microsoft resources or Microsoft subcontractor resources to perform services at the Customer's site, Microsoft will apply the following travel guidelines:
	    o Resources will typically be onsite for three (3) nights and four (4) days; arriving on Mondays and leaving on Thursdays.
	    o Resources might stretch their daily work plan in order to accommodate the project's weekly activities within those four days.
	    o As needed, resources might perform project activities by working remotely on Fridays.