

ITAM 365 Insights – Professional+

ITAM Scope of Work

State of Indiana

.

Activation Date: 5/20/2022

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SHI.com

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# Introduction

This ITAM SOW is effective as of the Activation Date, referenced above, is entered into by and between Customer and SHI and is issued pursuant to the ITAM Customer Service Terms located at <https://www.shi.com/CustomerServices/SHIInfo.aspx?ContentId=96510> (the “Terms”). Any term not otherwise defined herein shall have the meaning specified in the Terms.

# Service Description

This ITAM Scope of Work is to provide 365 Insights Professional+ ITAM Services utilizing the data collected from Microsoft which Customer has enabled through the registration process. The Service will then take this data and provide an overview of Customer’s Microsoft Office 365 subscriptions through SHI’s proprietary 365 Insights self-service portal (the “Portal”) dashboard visualizations. This dashboard will help Customer understand their Microsoft 365 online subscriptions and provide the basis for optimization recommendations, insight into service adoption and identify those users who could benefit from a different subscription level. Additionally, this dashboard will give Customer the ability to accurately maintain its 365 subscriptions to meet its actual needs and more effectively manage these products. SHI will also provide automated best practice recommendations based on Customer usage data. The Customer’s Portal use is governed by the terms located at <https://www.shi.com/CustomerServices/SHIMarketing.aspx?ContentID=96512>, which Customer agrees to in the registration process.

# Scope of Work

## Customer Entities in Scope

ALL

## Customer Locations in Scope

ALL

## Publisher in Scope

Microsoft (365 Subscriptions)

# Professional+ Service

The ITAM Services provides a view of the 365 effective subscription reports as well as insights into the detail level information that is required to manage the 365 environments.

The ITAM Services consists of:

* Summary of adoption and potential savings
* Optimization recommendations
* Automated onboarding – access to online library with FAQs, user guide
* Update Customer pricing one time per year
* Access to all future dashboard enhancements
* SHI Microsoft Licensing Executive Support
* Quarterly 365 Insights report
* Snapshot trending
* Bulk Provisioning and De-provisioning (weekly) – scope of service is limited to the subscriptions associated with Customer’s current licensing agreement. Migration of subscriptions to a different agreement / tenant is not in scope for this agreement
* Software request portal
* Customer reporting within DI based on data available within the portal
* Integration into on-premises metering tools (if available)
* 365 Process Maturity Assessment
* Contract Review and recommendations
* Assistance with implementing recommendations

# Deliverables

## Phase 1 – Right Scaling

Once the self-registration process is completed, data specific to service and product activation is collected and assessed against Office 365 plans to make a data driven recommendation for each individual user. Under 365 Insights Professional+ Services this recommendation logic can be customized to include additional data points such as department, location, and profile.

**Deliverables:**

* Access to adoption, utilization, and recommendation dashboards
* Quick Win recommendations (if any identified)
* Contract review recommendations

## Phase 2 - Recommendation Implementation

Phase 1 will generate several recommendations mainly around right scaling of subscriptions but also potentially around license compliance and data quality. SHI will work with Customer to review the impact of the recommendation on Customer and where appropriate look to manage and assist with implementation of recommendations.

**Deliverables:**

* SAM Plan, this plan will outline all recommendations if they are to be implemented or not and if so the timeline for implementation.

## Phase 3 – Maturity and Process Alignment

The 365 Maturity assessment is an integral delivery of the Professional+ Service. The assessment uses industry best practice to gain an understanding of how the current 365 assets are managed through their lifecycle. This includes the policies and processes in using the 365 software components.

The assessment will give you the recommendations and improvement plan to build consistent methodologies in managing 365 into the future.

**Deliverables:**

* Business Process assessment, how 365 is currently managed against best practices including an implementation plan.
* Profile assessment, through a series of workshops SHI will identify how 365 products are utilized by Customer’s user base and identify a series of profiles aligned to Microsoft / Office 365 service offerings and what triggers a profile to be applied to a user.
* BI Reporting assessment, through a series of workshops SHI will identify what specific reporting above and beyond that in Phase 1 is required by Customer to meet their business goals.

## Phase 4 – Customized BI Reporting / Systems Integration

During this phase SHI will work with Customer to implement any custom reporting requirements identified and agreed in Phase 3. Alongside implementation with additional on-premises metering data and software request portal technology.

**Deliverables:**

* Custom reporting
* Integration with on premise metering data (will include updated recommendation for right scaling)
* Integration with Software Request Portal
* Provisioning / de-provisioning:
  + SHI will be responsible for the following in the Customer’s ticket management process:
    - Review all in bound Publisher tickets within scope of this SOW
    - Update tickets upon receiving
    - Identify the type of subscription requested
    - Assign/unassign subscriptions to the employee specified in a ticket / request (subscription updates to be performed in Customer’s Publisher tenant)
    - Update tickets with appropriate details
    - Review/quality check for accuracy
    - Make any additional revisions (if required)
    - Close the ticket

## Phase 5 – BAU

During this phase SHI will routinely monitor the performance of the Service against the stated aims and goals alongside periodically updating all assessments based on progress made by Customer.

**Deliverables:**

* Access to adoption, utilization, and recommendation dashboards
* Progress monitoring against SAM and business process plans
* Updated recommendations on agreed timescale

# Assumptions

It is assumed that Customer has available resources to fulfil their responsibilities and that access to all SHI required data, systems, or personnel is available within a reasonable time frame requested by SHI as defined in the 365 Insights registration process. Data will be collected via an automated process and will meet the minimum requirements provided by SHI.

# Project Resources

SHI will provide access to its proprietary self-service online Portal and associated technical support as needed to set up and maintain the Portal. The Professional+ Service is a cooperative effort between Customer and SHI with both parties providing resources and support as appropriate.

# SHI Responsibilities

SHI provides the self-registration Portal and support with the related ITAM Services set-up including the following resources.

* **ITAM Project Manager** – Principal point of contact for the Services
* **Account Executive** - Responsible for maintaining overall relations in addition to acting as a point of contact
* **Customer Success Manager** – To drive customer engagement outcomes and act as customer advocate
* **Licensing Executive** - Responsible for supporting the Account Executive to ensure that the presented data is fully understood with the aim of providing licensing guidance
* **ITAM Consultant** – Responsible for the organization and analysis of purchase information to establish an accurate summary of license entitlements
* **System Engineer** - Technical specialist who engages with technical contacts to collect data through the API’s as well as providing support of a range of software discovery tools

# Customer Responsibilities

To use the Portal, Customer will need to complete the 365 Insights registration process. Customer will be responsible for ensuring all details provided are correct. Failure to do so will result in the inability to register for the Services or incorrect data being presented. In addition, Customer will need to grant SHI the appropriate system access credentials within the publisher portal. Customer’s completion of the registration process will allow SHI to establish the Services.

The following is a list of common Customer resources that will be required during the setup of the Portal and the ongoing ITAM Services:

* **Main Point of Contact** - Responsible for general oversight/coordination
* **Technical Contact(s)** - Responsible for working with SHI to set up Services
* **Credentials for automated connection to Microsoft API’s** – SHI will work with Customer to implement a secure data connection between Portal and Customer Microsoft tenant

The following is a list of common Customer dependencies required to enable SHI to perform provisioning/de-provisioning activities on behalf of the Customer:

* Read/write access to Customer’s Publisher tenant within scope of this SOW
* Web or relational database services access to Customer’s IT Service Management (“ITSM”) tool
* Read/write access to Customer’s ITSM tool
* Access to required documentation
* 1 – 2 Microsoft 365 E5 subscriptions assigned to SHI

# Fee Schedule

This pricing is based on total users of 365 subscription per month as defined in Customer data feed. If the total users of 365 subscription increases more than 5%, Customer will be responsible for increased fees.

|  |  |  |
| --- | --- | --- |
| Quantity | Item Description | Price |
| 40,000 | 365 Insights Professional+ Annual Subscription | $ 207,376.00 |
| Total |  | $ 207,376.00 |

# Invoicing and Payment

Customer will be invoiced annually in advance for the ITAM Services.

# Term

This subscription is an annual subscription, starting on the Activation date on this ITAM SOW.

# Renewal Term

This subscription will automatically renew and continue for twelve months, unless sooner terminated in accordance with the Agreement.

# Expenses

Customer shall reimburse SHI all reasonable out-of-pocket travel and related expenses incurred by SHI in providing the Services, upon invoice by SHI.

# Service Change Request Procedure

The following process will be followed if a change to this ITAM SOW is required:

* A Service Change Request (“SCR”) will be the vehicle for communicating changes to scope. The SCR must describe the change, the rationale for the change, and the effect the change will have on the project.
* The requesting party (Customer or SHI) will submit the SCR to the other party.
* The SCR must be signed by both parties to authorize implementation of the changes.

# Acceptance

|  |  |
| --- | --- |
| In witness whereof, the parties hereto have caused this ITAM SOW to be executed as of the day, month and year first written below. | |
| SHI International Corp.  Signed: | State of Indiana  Signed: |
| Name:  Title:  Date: | Name:  Title:  Date: |