

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:

* A subscription to SHI’s Portal
* 10 man-hours of 365 consulting services consumed in 30-minute increments
* Quarterly 365 Insights report
  + Snapshot trending

# Deliverables

The following Deliverables will be provided:

* Services set-up and data transmission support
* Support for the use of SHI’s proprietary Portal
* Access to adoption, utilization and recommendation dashboards consisting of:
  + 365 executive summary
  + Subscription overview
  + Services adoption
  + Optimization analysis
  + 365 snapshot
  + User activations
  + Building and department stats
  + KPIs for pulse

# 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

# 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

# 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

# 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 | $ 71,917.00 |
| Total |  | $ 71,917.00 |

# 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: |