Microsoft Software Assurance
[Program] Deployment Planning Services



Office 365 FastTrack Getting Started

Work Order

**IMPORTANT MESSAGE TO PARTNERS:** Use this template as a guide in defining your Planning Services engagement with your Software Assurance customer. This template is provided as guidance only for your Microsoft Planning Services consulting engagements. Whille it is not required to use this template, it is highly recommended you provide the customer a clear understanding of what is included in this engagement.

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"[Step 1 - delete the tables of contents you don't need. Make sure NON-PRINTING CHARACTERS are showing to remove the page breaks.]" "[DO NOT DELETE SECTION BREAK between the chosen table of content and the body of the document!]"

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INTERNAL: How to use this Template

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**Tips to save yourself time, please read the following before starting to work in this template.**

**FORMATTING CONSIDERATIONS**

**Non-printing characters:** Click the *Show/Hide button* () located on the *Home* ribbon, *Paragraph* group to see exactly what’s going on “behind the scenes.”

**View Gridlines:**Use this setting to see the table gridlines so that you don’t accidentally click and drag them. (*Layout* tab, *Table* group, *View Gridlines* button)

**Styles:** It is recommended to apply styles with the *Styles* panel (ALT+CTRL+SHFT+S) with *Show Preview* selected, but the styles are also available on the *Home* ribbon. **Do not apply any styling other than those listed.**

**PDF generation:** In order to have crisp, clear logos and images in the final PDF, it’s important that PDFs be created in Adobe Acrobat as “High Quality Print,” rather than the “Standard” setting that is built into MS Word. This setting is available in Adobe Acrobat (Standard or Professional), which can be purchased separately if it’s not already installed on your system.

**New Visual Identity guidelines require Segoe Pro Font**, which you can download from Media Bank. To install the Segoe Pro font onto your computer, extract and open the folder. Copy the files inside that folder into your fonts folder. Your fonts folder is located at C:\WINDOWS\Fonts. Need to reboot for them to appear in your applications.

**THE USE OF QUICK PARTS**

This template uses *Quick Parts* and *Building Blocks* extensively to store various elements of this document – Internal- and external-facing covers, three table of content options, tables which hold both images and their corresponding captions, data tables, and sidebars. All of these elements display thumbnails in the *Quick Parts* gallery so that you can easily find what you need. (*Insert* ribbon, *Text* group, *Quick Parts* drop-down, *Building Blocks* Organizer, click Name to bring WWLP elements to top of list.)

Objectives

The following section will be used for the 3-day and 10-day engagements, consisting of...(Usually Workshop Presentations, a Technical Assessment, and Perscriptive Next Steps)

Partner will provide the Microsoft® {Platform} Deployment Planning Services as described below. The {Platform} Deployment Planning Services are a consulting Solution provided by Partner.

The Solution described in this Work Order delivers a three day engagement or ten day engagement that can be used to evaluate Office 365. This Planning Services engagment utilizes Microsoft tools and technologies to provide a cursory analysis of business and technical requirements which may provide a basis for future design, planning, testing and deployment efforts. This Work Order focuses on the Office 365 envision workshop and planning and assessment engagement, for more information about Deployment Planning Services, please visit the website [here](http://planningservices.partners.extranet.microsoft.com/en/Pages/default.aspx).

Any timelines, dates, and delivery schedules provided here are estimates only, and are subject to change.

Scope

## Service Areas within Scope

Using a bulleted list, identify specific areas that are in scope for this engagement.

[Partner] will provide the following services:

The 3-day and 10-day Office 365 FastTrack planning engagements require a set of preparation and follow-on activities to provide the desired impact for both the customer and your partner organization. The following shows the expected flow of activities to present, ready, deliver, and complete the workshop. Details of these activities are found in the delivery guide.

* Present workshop offer to the customer, scope and schedule.
* Deliver the workshop, complete deliverables, submit completion report.
* Customer continues evaluation and partner takes actions on next step proposals.

The Office 365 FastTrack planning engagements deliver a specified set of customer activities to rapidly and predictably enable the service for the customer. The end deliverable for the customer is a Preliminary Deployment Plan document(3-Day) or a Detailed Deployment Plan document(10-Day). This deliverable both recaps the actions and maps the next steps for the customer to continue the evaluation and prepare for broad adoption.

**3-Day Envisioning Workshop Engagement**

The actual engagement is expected to consist of no more than 3 days. The following is the expected outline of supported activities:

* Planning workshop to understand project objectives, challenges and success criteria of Office 365 project
* Setup of a ‘Getting Started’ environment to help end users familiarize themselves with the Office 365 environment
* Configuration of deployment training labs
* Technical workshops to address specific customer concerns

**10-Day Planning and Assessment Engagement**

The actual engagement is expected to consist of no more than 10 days. The following is the expected outline of supported activities:

* Detailed planning workshop to understand project objectives, timelines, current environment and technical requirements
* Setup of a ‘Getting Started’ environment to help end users familiarize themselves with the Office 365 environment
* Technical assessment of current environment using planning tools and remediation checks
* Technical workshops to address specific customer concerns
* Configuration of deployment training labs

## Service Areas Out of Scope

Using a bulleted list, identify specific areas that are out of scope for this engagement.

Any area that is not explicitly listed 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:

* Establishment, remediation or deployment of core infrastructure and network services at the customer environment. Other Service Offerings are available for this purpose, such as email, directory services, networking, and so on.
* Application or data migration activities
* Sourcing or procurement of hardware
* Racking and cabling hardware or servers
* Custom development for line of business applications
* Integration with any custom deployment databases or tools
* Integration of deployed desktops to server components including Microsoft SharePoint
* Backups of the work done in the engagement. Customer is responsible that systems are adequately protected and backed up regularly.
* Non-Microsoft products. We will not provide subject matter expert support or consultant support for non-Microsoft products.

Approach

In this section, please include a description of the overall project approach, including, by project phase, Microsoft partner responsibilities, Customer responsibilities, and key deliverables.

## Key Partner Activities

Use key items from the Work Breakdown Structure (WBS). Relate to specific phases as appropriate.

The 3-day engagement will include the following.

The three-day Envisioning Workshop will provide the customer an Office 365 Preliminary Deployment Plan. This deliverable recaps the business intent, describes actions taken in the Envisioning Workshop, and outlines the current state of the environment.

The entire engagement is expected to consist of no more than three (3) days of activity. The following is the suggested outline of activities and can be customized as needed. A summary of the general approach for the engagement is represented here:

|  |  |  |
| --- | --- | --- |
| Day One | Day Two | Day Three |
| * Engagement Kickoff
* Startup Requirement Review
* Success criteria
* Planning
* Getting Started setup
 | * Getting Started setup validation
* Getting Started communication
* Initial Getting Started users support
 | * Support activities
* Subject deep dives
* Document creation
* Wrap-up & completion
 |

The 10-day engagement will include the following.

The ten-day Planning and Assessment Engagement will provide the customer the preliminary deployment plan from a typical 3 day engagement as well as an Office 365 Detailed Deployment Plan. This deliverable recaps the business intent, describes actions taken in the Envisioning Workshop, and will provide a technical assessment of current environment, upgrades needed, any remediation needed, and next steps for moving to Office 365

The entire engagement is expected to consist of no more than ten (10) days of activity. The following is the suggested outline of activities and can be customized as needed. A summary of the general approach for the engagement is represented here:

|  |  |
| --- | --- |
| Day 1 | Day 2 |
| * Engagement Kickoff
* Define project decision making process
* Understand Office 365
* Review Business Requirements/Business Objectives
* List Criteria for Success
 | * Meet with business users identified for project planning and prioritization
* Review getting started scenarios and prioritize business impact
* Begin building solution strategy and adoption priority
* Review criteria for success
 |
| Day 7-9 | Day 10 |
| * Identify onboarding blockers and build remediation plan for each
* Build priority of remediation items and notate if they block onboarding to Office 365 or limit user experience
 | * Report findings from engagement to key stakeholders
* Facilitate knowledge transfer to customer stakeholders
* Build enablement plan and documentation and remediation checklist with priority (must have, need to have, nice to have)
* Define next steps and confirm customer timelines
 |

Partner responsibilities include:

* Lead the Current Environment and Requirements Review
* Work with the customer to set-up the O365 Getting Started environment
* Work with the customer to validate and support the Getting Started environment
* Work with the customer to develop the final deliverable

## Key Customer Activities

* Providing information on key business, operational, and technical requirements
* Providing input into the project covered by this Work Order, the Startup Checklist and validating the results produced
* Defining the key success and acceptance criteria that will be used to determine the success of the engagement
* Scheduling sessions and activities to include appropriate personnel
* Attending sessions as appropriate
* Work with the delivery consultant to set-up and support the getting started environment
* Work with the delivery consultant to develop the final deliverable

Please list activities that the Customer must accomplish during each phase, in addition to any prerequisites that must be accomplished prior to the beginning of the phase.

## Key Service Deliverables

Following is a list of key project service deliverables that will be delivered within this Work Order:

Instructions to EM: [PLEASE READ, FOLLOW INSTRUCTIONS, AND THEN DELETE ALL PINK TEXT. RED TEXT REPRESENTS MANDATORY DELIVERABLES THAT cannot be modified, and need to be CHANGED to black.] To record this Offering for purposes of your compensation plan, you must include at least one of the “Project Phases” listed in the following table (for example, Envision, Plan, Develop, or Stabilize).

To receive credit for a Project Phase, you must include all deliverables that are identified as mandatory for the Project Phase, each of which is identified in red text below.

Any deliverables that are not marked as mandatory can be deleted, if appropriate. Be sure to verify whether modifications to the deliverables listed below require corresponding modifications to the Service Areas within Scope section.

The 3-day engagement will include the following.

Following is a list of key project service deliverables that will be delivered within this Work Order:

|  |  |  |
| --- | --- | --- |
| **Phase** | **Deliverable Name** | **Service Deliverable Description** |
| **3-Day, 10 Day Engagements** | * [Office 365 Planning Engagements Tools](https://portal.fasttrack.office.com/Account/LogOn)
 | * To be able to automatically generate the document at the end of the engagement you will be required to add the FastTrack App and Getting Started scenario content into the customer’s tenant.
 |
|  | * [FastTrack Planning Completion Confirmation](https://portal.fasttrack.office.com/Account/LogOn)
 | * Planning Services Completion Report provides a summary of the customer environment and tenant information.
 |

Project Roles and Responsibilities

|  |  |
| --- | --- |
| **Role** | **Responsibility** |
| **Delivery organization Engagement Manager** | * Manage the engagement.
* Provide delivery organization resources as necessary.
* Help resolving engagement issues.
 |
| **Delivery organization Infrastructure Consultant/SME** | * Sign off on project deliverable-specific documents.
* Manage and update project plan.
* Present the Kickoff Presentation.
* Lead the discussions and meetings.
* Drive subject content on specific areas of expertise including the actual design.
* Prepare documentation.
* Prepare and configure the Getting Started environment.
* Prepare weekly status updates to Microsoft or delivery organization and customer.
 |
| **Customer Technical Leads** | * Assist delivery organization during discussions and meetings.
* Provide input during discussions and meetings.
* Assist delivery organization during the limited Getting Started project.
* Assist delivery organization in setting up the limited Getting Started environment.
* Assist delivery organization in validating the limited Getting Started environment.
* Have the ultimate responsibility for the project.
 |
| **Customer Project Sponsor** | * Ensure technical resources are available when needed.
* Make key project decisions.
* Assign key customer technical lead.
* Responsible for review of delivery organization deliverables.
* Sign off on scope for project.
* Ensure facilities are available as needed.
* Resolve critical-path issues in a timely manner.
* Sign off on delivery organization documents and change control requests.
* Accept and sign off in a timely manner on documents that pertain to the delivery organization Work Order, and which are critical to the success of the engagement.
 |
| **Customer Project Manager** | * Sign off on Project deliverable-specific documents.
 |

Please provide a brief overview of key project roles and responsibilities.

General Customer Responsibilities

Please customize and add or delete sections as appropriate for your engagement.

The following are the responsibility of {Customer Company}

* Project management and assigning project manager or managers (“owners”) as needed, to specific technical initiatives.
* Overall technical direction for customer IT infrastructure, and how it affects the Solution.
* Ensuring availability of any required hardware and software.
* Provision of workspace, including desk, phone with internal and external access, network connection, print services, computer space, and an additional line (analog) for remote access to communicate with internal corporate network or virtual private network (VPN) access through customer’s corporate Internet connection.
* Provision of access to customer’s facilities and systems while maintaining appropriate levels of security.
* Provision of timely access to people, documentation, and systems as required for successfully implementing and completing this engagement.
* Provision of clear goals and objectives mapped to customer’s business and IT strategies. Joint goals and objectives need to be created and reviewed on a project-by-project basis.
* Provision of access to customer’s management and planners. To be successful, Partner team will need regular access to IT leadership to be able to provide input on customer’s strategic business and IT directions as they relate to the use of Microsoft products and technologies.

In addition to any customer activities identified elsewhere in this Work Order, {Customer Company} will perform or provide the following:

Please describe any additional customer specific responsibilities.

In performing our services under this work order and any applicable work order, we will rely upon any instructions, authorizations, approvals, or other information provided to us by your Project Manager or personnel duly designated by your Project Manager.

Project Assumptions

The services, fees, and delivery schedule for this project are based upon the following assumptions:

* The availability of your representatives to perform their roles on the project team.
* The availability of all the information required for properly envisioning and designing the Solution.
* **Product licenses**. Product licenses (Microsoft or non-Microsoft) will not be provided under this work order. Customer is responsible for acquiring all necessary product licenses required as a result of this work order.
* **Source code review.** Customer will not provide the delivery organization with access to any type of source code information. For any code, services will be limited to analysis of binary data only, such as a process dump or network monitor trace