

AgreeYa Response to Request for Proposal

for

Microsoft 365 Migration Services

RFP # 21-918-040

Dated: June 09, 2021



Submitted to



Submitted by



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1. Cover Letter

June 9, 2021

Attn: Matthew Potter
County of El Dorado
Procurement and Contracts
330 Fair Lane
Placerville, California 95667

RFP Title: Microsoft 365 Migration Services
RFP No.: 21-918-040

With reference to the above subject, AgreeYa Solutions, Inc. ('AgreeYa'), is pleased to submit this proposal to the County of El Dorado ('the County'), for providing the desired **Migration Services from Google Workspace Business to Microsoft 365 Suite of Products**.



Gold Cloud Productivity
Gold Collaboration and Content
Gold Application Development
Gold Data Analytics
Gold Application Integration

AgreeYa's **Microsoft 365 Practice** has strong credentials to support the County's desire of transitioning from the **Google Workspace Business** to the **Microsoft 365** suite. Since its inception, AgreeYa has continuously invested in

building strong competency around **Microsoft technologies** and this has enabled us to maintain our **Microsoft Gold Certified** Partner status for many years now. AgreeYa's status as a **Microsoft Gold Certified partner** in different areas is a testimony of our capability, experience, and customer satisfaction in the Digital Transformation space.



AgreeYa is a **FastTrack program partner** for Microsoft 365. AgreeYa's cloud experience is wide and deep. We are a **Microsoft CSP** (Cloud



Solution Provider) partner, which enables us to directly manage the entire Microsoft cloud customer lifecycle. Besides, AgreeYa has also been recognized by Microsoft as **Azure Government Beta Partner**, and **Co-Sell Ready partner**. AgreeYa is also a member of **Microsoft Partner Research Panel**, which is a very distinguished level of partnership and illustrates AgreeYa's competency in Microsoft technology stack.

AgreeYa team has carefully gone through the requirements given in the RFP document and the *Addendum No. 1 Question and Answers RFP 21-918-040 -revised* document released on June 2,

2021. AgreeYa has been working and implementing Microsoft 365 solutions, since Microsoft BPOS days and brings proven capabilities in all the areas that are part of this engagement.

AgreeYa understands that the project will start with conducting the **readiness assessment** in alignment with the **Microsoft FastTrack** process that will help the County onboard Microsoft Cloud solutions and drive **user adoption** for Microsoft 365. We will **migrate** file-based data from Google Workspace while preserving as much as possible history, formatting, and metadata; and migrate Google mail to Outlook Online; migrate 2 TB content in Google Drive to OneDrive; using simple automated and manual migration methods. We will also do an evaluation of the County's current systems to gather information about existing infrastructure and identify potential challenges; improve security, data protection and privacy, and compliance by implementing policies that will safeguard data and manage identity.

We will also **review and assess** the current Active Directory Structure and formulate the required plan for implementation; Migrating to the new Microsoft 365 solution will inevitably affect the County's people and processes. Therefore, AgreeYa will deliver a comprehensive solution which is not only **technology-centric and follows all best practices guideline of Microsoft FastTrack program** but also considers the people and processes of an organization.

Our approach to develop the solution and deliver services to the County has been developed over the years with other government clients and will be custom-tailored to meet the County's requirements. Further, the proposed Approach has also been **vetted by Microsoft Solution Architects**.

We'll discuss your project throughout the engagement phases and set expectations in terms of execution responsibilities. Also, FastTrack is an ongoing benefit, which means the County can use it as many times as they need throughout the subscription to access tools and resources to help gain user adoption.

We are pleased to inform you that AgreeYa has recently provided similar services to multiple public and private sector customers. The details of which are provided in the '*Case Studies and References*' section of the proposal response. We bring a perfect mix of competency, experience, and domain knowledge to meet the County's requirements and people to make it a success for County and AgreeYa.

The level of exposure on over 450+ Microsoft project initiatives has given our team unappalled expertise to implement Microsoft 365 solutions to the Government Community Cloud (G3) tenant. Due to our competency and long relationship with Microsoft as a **FastTrack** partner, AgreeYa can collaborate with Microsoft Engineers and leverage Microsoft tools and templates that are only accessible to a selected list of partners.

We would also like the County to take note that we are **Headquartered in Folsom, CA**, and only **20 minutes drive** from the County office. For County, this means that we can be readily available onsite for any important discussions with County stakeholders.

"Our long-term partnership with AgreeYa for implementing and managing our Microsoft 365 solutions has allowed us to enjoy the powerful business productivity tools, while also giving our organization the flexibility and scalability to stay competitive in today's connected marketplace."

-Director – IT, County in CA

Further, AgreeYa possesses deep experience of working for the **State of California public agencies**. Over a period of 22 years, AgreeYa has established itself as a **Microsoft System Integrator** and trusted advisory services provider for public agencies. AgreeYa has very recently implemented similar Microsoft 365 solutions and services for other public agencies. Below is a representative list of customers where AgreeYa has provided similar services such as Advisory services, Tenant Setup and Configuration, Microsoft 365 Application Suite implementation, Exchange Online migration, OneDrive for Business,

Microsoft Endpoint Manager (Intune), Enterprise Mobility + Security, and Governance Best Practices Implementation, Deployment and Training Guidance.

- City of Fontana
- County of Sacramento
- Los Angeles County
- Solano County
- Los Angeles County
- CA Lottery
- California State University, Chico
- California Department of Public Health
- Solano County
- Southern California Association of Governments
- Pierce Transit
- City of San Jose
- City of Palo Alto
- Alameda County
- City of Pasadena
- City of Roseville
- California Air Resources Board California (CARB)
- County of Sacramento
- San Joaquin County
- San Diego Unified Port District
- Sacramento Municipal Utility District (SMUD)
- County of San Mateo

Our **certified staff** brings deep expertise and understanding around both **Google Workspace** and **Microsoft** stack, with extensive experience in different **Microsoft 365 workloads including Exchange Online, Azure Active Directory, SharePoint, OneDrive, Microsoft Teams, Intune, etc.**

Each member of our proposed team brings several years of experience delivering successful projects of similar nature (Microsoft 365 Implementation). We bring a group of our strongest resources to form a project team that has **"been there and done that,"** and we will back those resources with strong management, process, and infrastructure support to ensure project success. Some of the key highlights of the project team are mentioned below:

Proposal for Microsoft 365 Migration Services

- **Strong expertise** of the team in **Google Workspace** to **Microsoft 365** deployment
- Understanding and experience of **working with public agencies** on **Microsoft 365** Implementation projects
- **The team who has worked together** in the past
- **Microsoft Certified** Professionals
- **SME and Guest speakers** at Microsoft events and conferences

At AgreeYa we have high standards of mature processes to drive success. Our proprietary 'SUMMIT' quality framework is derived out of the four-dimensional process that includes Organizational, Engineering, Project Management, and Support processes. Our accreditation as ISO 9001:2015 certified organization and quality processes CMMI certified by Software Engineering Institute (SEI) of Carnegie Mellon University (CMU) is a testimony of the same.



We will provide helpdesk support during the have also proposed to use **AgreeYa Chatbot**. It's an AI-Powered Self Service Chatbot, built on **Microsoft BOT Framework** and **Azure AI**. AgreeYa Chatbot will provide a self-service and interactive way of answering employee queries as a **Level 1 (L1) support**, and along with this, we will provide normal human support, reducing burden on helpdesk team.

Our Chatbot will be deployed in Microsoft Teams and will help in improving the adoption of the new tenant, establish governance, drive automation, and reduce the cost of operation while improving service levels of the County's IT Helpdesk.

The key information of the **firm, contact person authorized to contractually bind the firm,** and the **assigned Project Manager** for the project has been provided in the table below:

Name of Responding Firm	AgreeYa Solutions, Inc.
Mailing Address	605 Coolidge Drive, Folsom, CA 95630
Type of Organization of Firm	Corporation
Phone Number	(916) 294-9900
Contact person authorized to act as the contact in matters regarding this proposal:	
Contact Name	Ajay Kaul
Address	605 Coolidge Drive, Folsom, CA 95630
Contact Title	Managing Partner
Contact Email Address	ajay.kaul@agreeya.com
Contact Phone Number	(916) 813-6300
Fax number	(916) 404-4009
Proposed Project Manager for this Project	
Contact Name	Donna Lynne
Address	605 Coolidge Drive, Folsom, CA 95630

Proposal for Microsoft 365 Migration Services

Contact Email Address	donna.lynne@agreeya.com
Contact Phone Number	(916) 303-0935
Fax number	(866) 886-1555

AgreeYa has some suggestions for the "Attachment C - Sample Agreement for Services" that are listed under the "RFP Exception List" section of the proposal. We would like to discuss further with the County our suggestions and commit to our ability to fulfill the insurance requirements contained in the Sample Agreement.

We appreciate the opportunity to work with the County and being **local to the County** can meet face to face as and when needed. This will also provide the opportunity to expedite any bottlenecks that may come up in the course of the project. Being a **FastTrack** partner, we will be able to bring Microsoft direct expertise in the project as needed from time to time. If you have any questions regarding our proposal, feel free to contact me on the details provided above.

Yours sincerely,



Ajay Kaul, Managing Partner

2. General Requirement

Certification Details

Certification as a Fast-Track and Microsoft Gold Partner with evidence of current endorsement;

Provided below are the details of our **Microsoft Gold Partner** and **FastTrack** detail.

Provided below is a letter of endorsement from Microsoft related to our competencies.

Microsoft Corporation
One Microsoft Way
Redmond, WA 98052-6399

Tel 425 882 8080
Fax 425 706 7329
www.microsoft.com



6/9/2021

To whom it may concern:

I hereby confirm that AgreeYa Solutions Inc. has satisfied the requirements for demonstrating and validating their technical capabilities in the Microsoft Partner Network program.

AgreeYa Solutions Inc. (MPNID: 1055891)
605 Coolidge Drive
FOLSOM, CA - 95630
United States

Competencies: Demonstrate technical capabilities in Microsoft products or technologies.

- Gold Cloud Productivity (Expires on 4/30/2022)
- Gold Collaboration and Content (Expires on 4/30/2022)
- Gold Application Integration (Expires on 4/30/2022)
- Gold Data Analytics (Expires on 4/30/2022)
- Gold Application Development (Expires on 4/30/2022)

Best Regards,

A handwritten signature in black ink, appearing to read "Dan Truax".

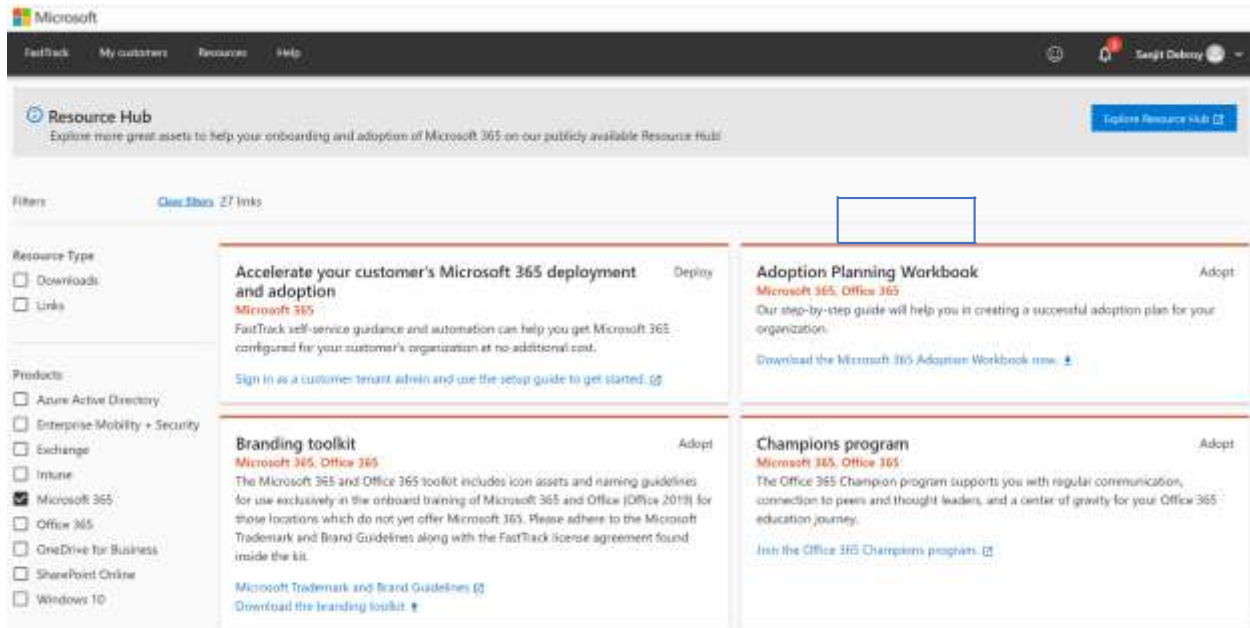
Dan Truax
General Manager, Partner Digital Experiences and Programs

Microsoft Corporation

Proposal for Microsoft 365 Migration Services

FastTrack is a service provided by Microsoft that helps customers deploy Microsoft 365 (Office 365, Windows 10, and Enterprise Mobility + Security (EMS)) cloud solutions and drive user adoption as per the licenses purchased and subscriptions taken. Customers with eligible subscriptions to Microsoft 365 can use **FastTrack** and **AgreeYa as a FastTrack program partner** for Microsoft will assist the County with all FastTrack-related benefits.

A screenshot of Microsoft 365 FastTrack ready reference from the Microsoft website is provided below



AgreeYa can deliver quick and predictable outcomes to provide the County with a positive onboarding experience, as Microsoft's **FastTrack** program partner based on the experience of working with many Customers.



Firm Overview

Corporate resume, evidencing experience, expertise and operational viability;

Provided below is the Corporate resume, evidencing experience, expertise, and operational viability of our firm.

AgreeYa Overview

Established in March 1999, AgreeYa Solutions, Inc. is a **Microsoft System Integrator** and **global provider of software, solutions, and services** focused on delivering a competitive advantage to our clients through its partnership approach, global capability, and flexible delivery model. AgreeYa with its **Global Headquarter in Folsom, California**, a **20 minutes' drive** from the County office, is managed by a seasoned board and executive management team based in California.



AgreeYa is an **SEI CMMI** and **ISO 9001:2015** certified organization. With these accolades, our customer base comprises **over 550 organizations** including **more than 100 public organizations**, out of which **50 of them** are in California, and over 20 being Fortune 500 nationwide and globally. We deliver a competitive advantage through our collaborative approach, global capability, and flexible delivery model.

A slide titled "Microsoft 365 + AgreeYa: The Right Partner for Your Digital Transformation". The slide is divided into several sections. On the left, under "Trusted by Customers and Microsoft alike", there are four statistics: 450+ Microsoft 365 (Formerly Office 365) / SharePoint / Azure projects delivered successfully for customers; 800+ Microsoft 365 (Formerly Office 365) / SharePoint / Azure professionals including MCP, MCSD etc.; 400+ Microsoft customers; and 15+ Recognitions from Microsoft. Below these are logos for Power Platform, Microsoft, Azure, FastTrack, and a SharePoint Beta Partner award. On the right, under "Microsoft Partner", it lists capabilities like Data Cloud Productivity, Data Collaboration and Content, and Gold Application Development. It also shows Organization ID 553717 and MPN ID 1055091. Below that, it lists partner types: Microsoft FastTrack Partner, Azure Government Beta Partner *, and SharePoint Beta Partner*. Further down, it says "Software Assurance Program Enrolled" with buttons for DDPS, SDPS, SSOPS, S&MEDPS, and PVDPS. At the bottom, "Relevant Experience" includes "Strong Public Sector Experience (More than 100 Clients, 50+ in State of California)" and "Similar work experience with City of Pasadena, Pierce Transit, City of Fontana, Port of San Diego, California Department of Public Health (CDPH), etc.".

Microsoft 365 + AgreeYa

The Right Partner for County's Digital Transformation

AgreeYa has very recently implemented similar Microsoft 365 solutions for public agencies like **City of Fontana, Solano County, City of San Jose, Port of San Diego, City of Pasadena, Pierce Transit, California Department of Public Health (CDPH)**, to name a few.



Empowering Digital Government: For more than two decades, AgreeYa has worked with local and state governments to increase productivity, enhance citizen services, drive efficiencies, and more. AgreeYa’s goal is to transform government operations and citizen services using social, mobile, analytics, cloud, and other innovative solutions. AgreeYa Solutions also exhibited at **Microsoft’s Enterprise Technology Conference, IGNITE**, held in Florida

whereby our team of Microsoft solution experts was available to answer any questions during the conference.

Statement for the size of the firm

AgreeYa Solutions is a large-sized business enterprise with multiple offices across states employing more than 1,800+ staff. We are not only a leading provider of Microsoft technology solutions but also maintained our #1 position in the Sacramento region for IT Consulting Services consecutively for four years. We have a qualified team comprising of certified Microsoft staff to develop and implement the desired solution for the County.

AgreeYa’s Clientele List

Our customer base comprises **over 550 active global customers; We have also served more than 100 public organizations** and over **20 Fortune 500** companies. The below illustration depicts logos of our key clients including the public sector:



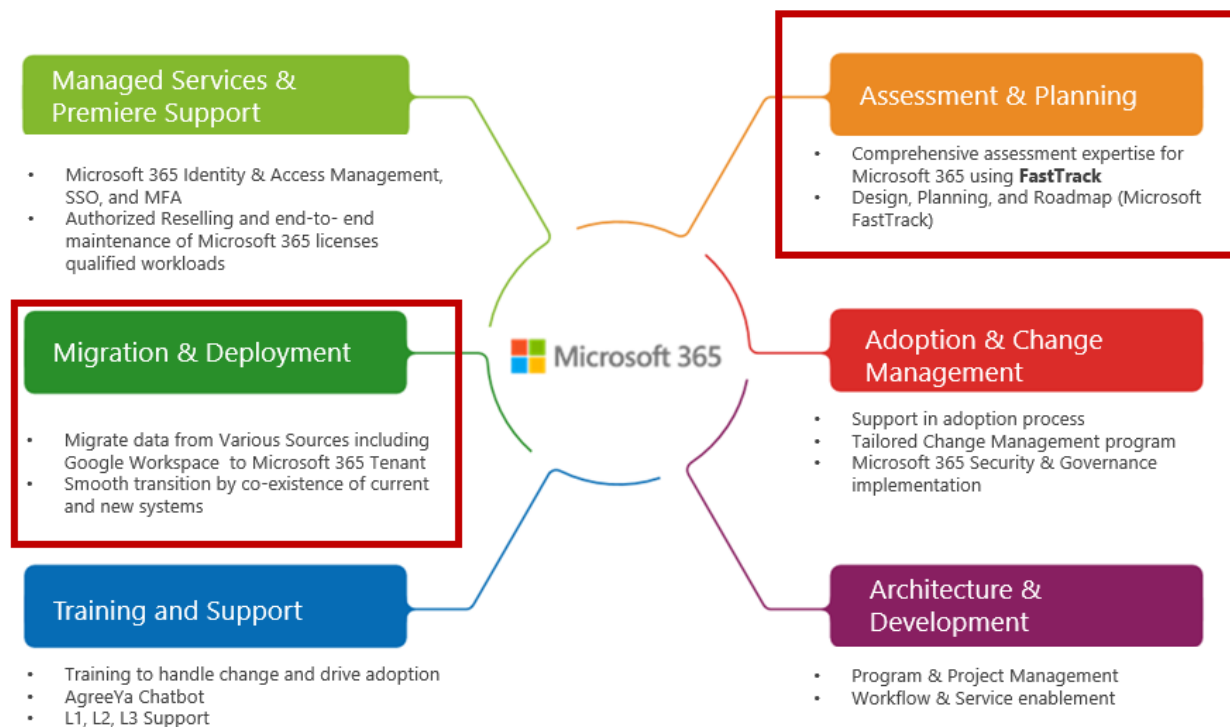
Financial Condition of the Firm

AgreeYa certifies that we are capable and financially fit for the successful completion of this work to be implemented under this RFP.

AgreeYa's Experience/ History providing Similar Services

Our Microsoft 365 Services Practice Overview

AgreeYa's Microsoft 365 Practice has strong credentials to support the County's desire of transitioning from **Google Workspace** to the **Microsoft 365** collaboration suite for its email, calendar, document management, and collaboration needs; Over the last decade, we have successfully executed numerous numbers of Microsoft 365 projects. Below, we have summarized our offerings, expertise, experiences, and qualifications in Microsoft 365 landscape.



AgreeYa delivers expertise and solution-based consulting with Microsoft tools and technologies to implement different Microsoft 365 workloads for organizations worldwide by leveraging our **Microsoft Center of Excellence** and global delivery model through a **suite of complementary solutions, tools, and accelerators**. Our assigned project team helped migrate **Google users** to **Microsoft 365** tenant as well as migrated **Google Drive** to **OneDrive** and **Gmail mailboxes** to **Exchange Online**.

AgreeYa helps customers enhance their collaborative environments and information sharing. AgreeYa's Microsoft 365 service offerings using FastTrack services include resources, tools, and best practices to help customers plan for a successful deployment. We also provide viability analysis, assessment, discovery, planning, migration, customization and configuration, user interface design, SharePoint workflows, portal enhancement, and content updates, support, and maintenance.



Key Awards

AgreeYa is proud to highlight some of its recent Accreditations below:



- Earned **Award of Excellence** in Innovative Use of Technology Category from American Planning Association of Los Angeles
- Earned the "**Technology Innovation Award**" in the Citizen category from Government Technology Magazine's Special Districts program
- Earned the "**EPA Clean Air Excellence Award**" for one of our application
- Most promising SharePoint solution providers 2020 by CIO Review
- Recognized as Top (Ranked #1) IT Consulting Companies by Sacramento Business Journal.
- Featured among 'TOP Software Companies in Sacramento, CA, Region' by Sacramento Business Journal.
- "Bronze Stevie Award" in the Company of the Year - Business & Professional Services category for Fifth Consecutive Year
- Top 5 Outsourced Product Development Companies
- Top 20 Most Promising Enterprise Software Consulting Companies
- Gartner Cool Vendor (Enterprise Mobility)
- Ajay Kaul, one of our Managing Partners was featured on Spot Light of Sacramento Business Journal and various technology publications have published his thoughts on the emerging technologies and Microsoft 365 workspace.

We believe that **AgreeYa** is the **right partner for the County** to execute a smooth and successful **Microsoft 365** implementation and migration **from Google Workspace** for various workloads like Google Mail, Calendar, Google Drive, Google Sites, Google Forms, Google Docs, etc.

References and Case Studies

Successful project experience with at least three (3) prior G3 M365 Migrations of similar profile & scale (Three [3] references required, public sector references preferred. At a minimum proposer shall provide the following reference information: Customer/Client name, address, Customer/Client Project Manager name, phone number, and email address);

Provided below are **three (3) Customer References** and some **Case Studies**. AgreeYa has extensive experience with clients of various sizes for the implementation/migration of Microsoft 365 products. We approach each project with a fresh perspective while leveraging our past expertise and industry knowledge. We bring the scale and reach required to provide the County with a truly comprehensive set of services. We are a recognized leader in Microsoft 365 space. We have driven the implementation of numerous **similar initiatives** stretching across the spectrum of California and other state government agencies as well as the Private Sector. Our leadership in Microsoft 365 landscape means we have the industry know-how and technical expertise needed to support you in all things data.

References

Provided below are three (3) Customer references where we have done work similar to the County's requirement.

City of Fontana, CA

Project Name: Teams and Intranet Portal Implementation using Microsoft 365/SharePoint Online		Period work was completed: November 11, 2019 – Ongoing	
Client Name: City of Fontana	Client Address: 8353 Sierra Ave, Fontana, CA 92335	Client Phone Number: (909) 350-6690	Client Email: cteveda@fontana.org
Client Contact: Cristina Tejeda, Business Analyst II			
Description of work performed: Please refer to the "Case Studies" sub-section of the proposal below.			

San Diego Unified Port District

Project Name: G3 Microsoft 365/SharePoint Online Intranet Implementation		Period work was completed: October 01, 2018 – Ongoing	
Client Name: San Diego Unified Port District	Client Address: 3165 Pacific Highway San Diego, California 92101	Client Phone Number: NA Prefers email	Client Email: paalvarez@portofsandiego.org
Client Contact: Paul Alvarez, Information Technology			
Description of work performed: Please refer to the "Case Studies" sub-section of the proposal below.			

Pierce Transit

Project Name: Microsoft 365 G3 Implementation for SharePoint, Continuing Managed Services, and Intranet Redesign		Period work was completed: September 17, 2018 – Ongoing	
Client Name: Pierce Transit	Client Address: 3701 96th Street Southwest Lakewood Washington, 98499	Client Phone Number: (253) 983-3306	Client Email: bcampbell@piercetransit.org
Client Contact: Brent Campbell, IT Project Manager			
Description of work performed: Please refer to the "Case Studies" sub-section of the proposal below.			

Case Studies

Below are just a few of the many projects that AgreeYa has executed on behalf of clients across various sectors. These examples will provide a flavor of the unique experience we bring to the County.

	SharePoint	MS Exchange	OneDrive	Microsoft Teams	Microsoft 365 Governance, User Adoption, and Training	Support Services	Public Agencies
Solano County	✓				✓	✓	✓
City of Fontana	✓			✓	✓	✓	✓
City of Palo Alto	✓				✓	✓	✓
Pierce Transit	✓				✓	✓	✓
Blue Diamond Growers	✓		✓	✓	✓	✓	
California Department of Public Health (CDPH)	✓				✓	✓	✓
City of Pasadena		✓			✓	✓	✓
City of Roseville		✓		✓	✓	✓	✓
Sacramento Municipal Utility District (SMUD)	✓			✓	✓	✓	✓
Wimberly Allison Tong & Goo (WATG)		✓			✓	✓	
San Diego Unified Port District	✓				✓	✓	✓

Solano County



Client Name	Solano County
Project Name	Intranet Migration using Microsoft 365/SharePoint Online
Client Domain	County in California
Dates of Engagement	July 1, 2018 – June 30, 2020
Prime or Subconsultant:	Prime
Project Organization Details:	<p>Agile Project Management</p> <p>Client – Client Project Manager, Sponsors/Department Stakeholders, Product Owners, etc.</p> <p>AgreeYa – Project Manager, SharePoint Technical Specialist, SharePoint Developers, Testers</p>

Scope of Work
 AgreeYa was tasked with redesigning and migrating the existing Solano County Employee Intranet Site to the Microsoft 365/SharePoint Online environment.

- County used its intranet actively as a unified collaboration hub and a central document and workflow management system ensuring the county's daily business processes and supporting uninterrupted employee collaboration.
- With the SharePoint Online release, the County decided to upgrade its intranet. switching to the newest version of SharePoint, the Customer wanted to benefit from numerous advantages, including the solution's better performance, improved data protection, the possibility to adapt the intranet to mobile devices, better ROI, and more.
- This was a non-SharePoint to SharePoint migration, the most challenging part was to decide which existing items need to map with which online container, and what objects needs to be left behind
- The existing Intranet had only one site for all the departments and County wanted to create different sites for each department so that they can move departments wise content to related department sites.

Solution

- AgreeYa experts started the SharePoint migration project by assessing the current state of the intranet. Our experts analyzed the content database, assessed the customization level of the intranet, and examined custom solutions that could require additional setting after the migration
- The analysis performed by the SharePoint experts allowed us to draw up the migration plan and start the project's active phase. The project was divided into several stages to enable a step-by-step migration of the intranet content and solutions without interrupting the County's daily business processes
- The team created the backups of all content databases to ensure data safety. AgreeYa paid particular attention to the migration of vital solutions and quality management.

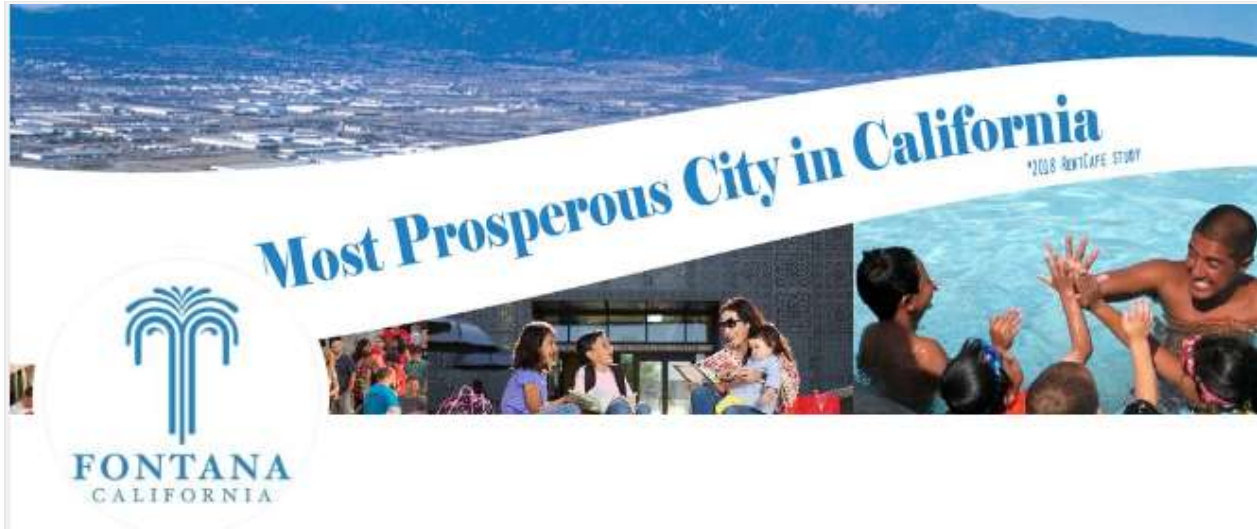
AgreeYa performed the following activities as a part of engagement:

- Created homepage mockups with different themes & layout showing content provided by County
- Designed department site page mock up with different themes and layout with content provided by County
- Developed a deeply customized responsive Home page as per selected mockup
- Developed Department pages/sites as per selected mockup
- Performed Content mapping and created Information Architecture
- Performed Content migration and migrated 400 static pages along with county users as needed
- Administrator & End-user training sessions were conducted. These were supported by Admin & End User Manuals and Knowledge transfer sessions
- User adaption and support services were continually being provided to County to manage the intranet

Impact

- The upgraded intranet provided a much better performance to end-users
- Particularly, employees highly appreciated the improved page response time
- Furthermore, the upgraded intranet allowed users to work effectively with large files and benefited from the improved sharing capabilities
- Employees can access the intranet from mobile devices to collaborate with colleagues remotely
- By implementing appropriate governance, it ensured that the services meet the business needs of the County securely and cost-effectively

City of Fontana



Client Name	City of Fontana
Project Name	Teams and Intranet Portal Implementation using Microsoft 365/SharePoint Online
Client Domain	Public Sector
Dates of Engagement	November 11, 2019 – Ongoing
Prime or Subconsultant:	Prime
Project Organization Details:	<p>Hybrid Agile Project Management</p> <p>Client – Client Project Manager, Sponsors/Department Stakeholders, Product Owners, etc.</p> <p>AgreeYa – Project Manager, Microsoft 365 SME, UI/UX Designer, SharePoint Developers, Microsoft Teams Specialist, Quality Analysts, Trainer</p>
Scope of Work	<p>The objective of this project was to design, develop, test, and deploy the Intranet portal for the City using out-of-the-box features of the Microsoft 365/SharePoint Online platform. Also, the solution required the implementation of MS Teams using which City officials and</p>

departments can collaborate among themselves efficiently and externally with suppliers, vendors, and customers. The City's IT team also needed help with deployment, particularly around their unmanaged provisioning and accessibility, resulting in a need for increased governance functionality.

Solution

After careful review of the City's Intranet and MS Teams implementation requirement, we have implemented the below functionalities as part of the scope

- The content and structure of the Portal was designed with a high degree of usability and flexibility in mind
- All changeable content in the solution, be it text, photos, videos, links, or file attachments were organized as content items
- News Article, Alerts, Calendar Event, Library Article, Wiki Pages were implemented
- The solution implemented allowed the users to add one or more tags to each content item
- Managed and configured site and site collection features functionality and user permissions
- Both departmental and non-departmental pages were implemented
- Provided ability to users to manage, modify, and create content as per access rights provided
- Various forms, content pages, and page layouts were created using SharePoint Designer
- Integrated **AgreeYa's Virtual Chat Assistant (Chatbot)** Solution built on Microsoft BOT Framework. The BOT helped in leveraging the existing pool of knowledge and insight gathered and driven continuous improvement of services by reducing the overall tickets
- Assisted in designing the governance plan and ensured that it complies with the best-in-class standards
- Conducted Risk and Impact analysis whenever there is any change in the business requirement and continually updated the business requirement document
- Conducted a pilot of MS Teams Rollout and performed internal testing to select City users
- User Acceptance Testing completed on the Pilot rollout
- Fixed any issues as suggested as part of the UAT
- Rolled out Teams across City departments after the Pilot phase
- Governance best practices implemented for Teams related to administrative rights, naming conventions, 3rd party app availability, archival policy
- Training to City staffs provided on the use of Teams and Intranet
- Providing required support for any issues raised by City project stakeholders

Impact

Deployment of SharePoint Online and Microsoft Teams proved to be beneficial to everyone

- Secure Collaboration: Internally, the right information needed to be uploaded and shared in only the right Teams. And external guest access – such as vendors and contractors – were managed appropriately to prevent lost control over shared content
- Operational Governance: By replacing the IT team's task of provisioning Teams to reduce their burden, the appropriate control over that provisioning was set up. Enforced lifecycle management had to be implemented to maintain a clutter-free environment and prevent dark data sprawl
- The self-service provisioning functionality for Teams with organization policies being automatically enforced not only mitigated human error but has resulted in an 80% reduction for the IT team to provision Teams
- City departments can communicate and collaborate with internal and external parties without worrying about security and bothersome permission management while reducing the burden on the IT department

City of Palo Alto



Client Name	City of Palo Alto
Project Name	SharePoint 2007 to Microsoft 365/SharePoint Online (GCC) Migration
Client Domain	Public Benefit Organization
Dates of Engagement	December 1, 2016 – March 31, 2017
Prime or Subconsultant:	Prime
Project Organization Details:	<p>Hybrid Agile Project Management</p> <p>Client – Client Project Manager, Sponsors/Department Stakeholders, Product Owners, etc.</p> <p>AgreeYa – Project Manager, SharePoint Developer. UI Designer, Tester</p>
Scope of Work	<p>The City procured Office 365 licenses for an organization-wide implementation and desired to migrate its on-premise MOSS 2007 to SharePoint 2013 Online platform. Looking at AgreeYa’s extensive experience in developing and migrating SharePoint Intranet sites that are built on the robust foundation of Microsoft SharePoint on-premise and SharePoint Online (Office 365), the City chose AgreeYa as their strategic partner for this engagement.</p>

Solution

This engagement was particularly exciting for us because we were always looking for the opportunity to create and establish SharePoint based intranet environments. We have enabled a number of our customers to feel the pulse of their organization through intuitive, scalable, and easy to configure designs and architecture.

AgreeYa experts deployed the proven business model to provide the desired SharePoint services to the City. We allocated a dedicated Project manager who efficiently managed the requirements shared by the City and acted as a single point of contact for the City staff to ensure a quick response time for their service requirements.

The first phase of the project comprised of an as-is migration of the City's existing intranet, which was followed by further **enhancements & customizations** in the subsequent phases.

AgreeYa Team undertook the following activities as a part of Phase 1 work:

- Analyzed City's existing content and environment & prepared content inventory
- Created information architecture design for SharePoint Online environment
- Responsible for setting up SharePoint Online production environment
- Configured Site Collection, Sites, Libraries and Pages in SharePoint Online environment
- Migrated an estimated 46 GB of content & pages from existing MOSS 2007 SP2 to SharePoint Online
- Responsible for setting up SharePoint Online access for Site Owners and other governance policies like the classification of sites, groups, and files
- The navigation structure (menu) was separated from the content structure (categories)
- Conducted SME, Administrator, Power Users and End Users Training
- Provided post-migration support

Impact

- AgreeYa efficiently recognized each of the City's strategic objectives, business needs, operational considerations, and organizational challenges.
- We implemented a collaborative, well-communicated, and consultative approach for the engagement.
- We worked continuously with the City team to track their project metrics around schedule, quality, and progress.
- Post-deployment ongoing training support provided smooth transition Citywide

Pierce Transit



“AgreeYa project team has been one of the best that I have ever worked with. Your team has a thorough knowledge of the solution that was provided to us and is quick to respond to our needs. Thanks for all the help.”

Client Name	Pierce Transit
Project Name	Microsoft 365 G3 Implementation for SharePoint, Continuing Managed Services, and Intranet Redesign
Client Domain	Public Transit
Dates of Engagement:	September 17, 2018 – Ongoing
Prime or Subconsultant:	Prime
Project Organization Details:	<p>Hybrid Agile Project Management</p> <p>Client – Client Project Manager, Sponsors/Department Stakeholders, Product Owners, etc.</p> <p>AgreeYa – Project Manager, SharePoint SME, Business System Analyst, UI/UX Designer, SharePoint Developers, Quality Analysts, Trainer</p>
Scope of Work	<p>Pierce Transit wanted AgreeYa to design, develop, test, and deploy SharePoint Online-based Intranet solution and Project Portfolio Management (PPM) Solution. Pierce Transit was using SharePoint 2007 for its intranet and its support was to be discontinued in the immediate future that would have posed a substantial security risk to the current Intranet solution. Pierce Transit wanted to rebuild its Intranet on Microsoft 365 Government Community</p>

Cloud (GCC). The redesigned Intranet on SharePoint Online GCC required the creation of custom workflows that would allow for

- Better workflows with extended content capabilities
- Electronic signature capability
- Improved search module
- Better document previews
- Video support
- Document classification and retention management

Solution

To overcome these challenges, AgreeYa provided a complete rebuild of Pierce Transit intranet on **SharePoint Online - GCC**. All 900 Agency employees could access the Intranet on their desktop computing devices (or on kiosks for Bus Operators and Mechanics) and had varying roles and usage depending on the position. The work was implemented in a phased manner.

- Phase 1: Governance, design, and creation of the home page, branding, and creation of templates and backend structure including Functional Site Template, Analytics Site Template
- Phase 2: Worked with departments to create department pages and workflows including Team Page, Project Site Template, Department Page Templates, Workflows for document collaboration, Taxonomy, Digital Signatures, and Branding. Team sites for Pierce Transit teams and committees, including calendars, tasks, discussion area, information related to the team.
- Phase 3: Designed and implemented a customized Portfolio Management Solution that included the implementation of multiple functionalities including Portfolio Home Page, Portfolio Selection Page, Reporting Page, Project Site Pages, Templates Page, and Training Page.
- Dashboard - Showed the Project Manager how the project is doing with a summary of work, goals, project status, etc.
- Project Planner – Built a work breakdown structure including tasks, activities, and milestones using the out-of-the-box Tasks List in SharePoint
- Document Library – Provided the capability to store project documents, deliverables, and other resources. This provided document governance with authoring, version control, check-in/check-out, and approval workflows.
- Provided training to Support Staff
- Ongoing Managed Support Service is provided to manage the Intranet

Impact

Because of moving to SharePoint Online - GCC, Pierce Transit employees are now working more productively because they receive targeted information that's directly applicable to their job position. Now, they don't waste time searching for information. Everyone can personalize their home page with apps and sites they use for their day-to-day work.

AgreeYa's Proposal for Microsoft 365 Migration Services

- An upgraded SharePoint Intranet implementation enhanced employee communications and provided for effective portfolio management functionality
- Digital Signatures allowed users to sign the documents without switching the applications
- Employees collaborating with sensitive information can store it on a more secure, online repository instead of using third-party storage solutions or company file shares
- Project Resources and Project Management
- Improved governance because of departmental policies, roles, responsibilities, and processes implemented in the solution
- Better user adoption of the intranet among employees

Blue Diamond Growers



“We worked with AgreeYa to upgrade from SharePoint 2010 and implement OneDrive and Teams. The resources who worked on the project were knowledgeable and helped us with smooth migration. I highly recommend AgreeYa’s service.”

Client Name	Blue Diamond Growers (BDG)
Project Name	Intranet, OneDrive, and Teams Implementation leveraging Microsoft 365
Client Domain	Agricultural Cooperative
Dates of Engagement	August 21, 2017 – Ongoing Project
Prime or Subconsultant:	Prime
Project Organization Details:	<p>Agile Project Management</p> <p>Client – Client Project Stakeholder, Product Owner</p> <p>AgreeYa – Project Manager / Scrum Master, Microsoft 365 Specialist, SharePoint SME, SharePoint Developers, UI/UX Designers, Testers, Trainer</p>
Scope of Work	
<p>As part of its initiative to move to the cloud, the client wanted to migrate from SharePoint 2010 environment to Microsoft 365/SharePoint online environment. Through this migration, the client wanted to achieve the following:</p> <ul style="list-style-type: none"> • Site Rebranding • Data cleanup • Single Sign-On • Increased end-user adoption 	

In addition to that, they also wanted to **migrate the MS Project server to MS Project online** with power BI reports, wanted their growing documents to be secured, and needed to collaborate with various stakeholders.

Solution

As part of the requirement, AgreeYa migrated the existing on-premise portal to a unified collaboration platform on the cloud that is not hardcoded and can be flexible in terms of changing business requirements, standards and legal requirements, communication patterns, work processes, and reporting. It allowed in reducing maintenance expenses and implementing new requirements easier and faster.

To achieve the above, AgreeYa used its proven approach which facilitated the smooth migration with new value generation for the client. The proposed solution included the following:

- Performed Readiness Assessment, Discovery, and Planning
- Provisioned Microsoft 365
- Defined and configured identity and security settings
- Migration of content from SharePoint 2010 to SharePoint Online using Sharegate tool
- Retire unwanted content & archive dead content before moving to Office365
- Maximize usage of Microsoft 365 features with Intune MDM & Single Sign-On
- Configured Security and Compliance in Microsoft 365
- Monitoring and Troubleshooting Microsoft 365
- Configured Client Connectivity to Microsoft 365
- Plan and Configure Directory Synchronization
- Remediate identified issues
- Enhance end-user adoption by providing appropriate training and support to impacted user's post-migration
- Assisted in Project Online set up and configuration for BDG
- Used Power BI Reporting for BDG Project Online Reporting
- Project Online Customization – Developed new workflow using (SharePoint Designer Workflow for Project Online)
- Worked with Power Apps to customize Microsoft 365 solution
- Implemented Power platform to display Insights Analytics & Advocacy reports published in the document library

AgreeYa also implemented **Microsoft OneDrive**, using which Client employees were able to easily and securely store and access important files from all their devices. Implementing OneDrive helped in protecting organization data through advanced encryption while the data is in transit and at rest. OneDrive also helped in ensuring that users adhere to the most rigorous compliance standards by enabling them to choose where their data lives and providing detailed reporting of how that data has changed and been accessed. Storing files in only one place improved governance.

Further, as per the collaboration need of its employees, AgreeYa implemented **Microsoft Teams** which allowed in better collaboration among employee's organization-wide through Calendar module, Chat functionality, ability to record meetings which meant that users who cannot attend a particular meeting that was scheduled can catch-up later and hear the recording and other tools within Teams.

Impact

The migration to Microsoft 365 resulted in a significant improvement in accessibility and ease of use. The proposed solution provided several benefits which include:

- Fast and cost-effective migration
- The enhanced portal provided faster access time for the contents
- Enabled business continuity on the new platform by migrating all data with full fidelity, including version history and all associated metadata
- Leveraging OneDrive helped in better document management
- Faster Development Lifecycle: AgreeYa project team worked collaboratively and closely with the client's team and migrated the site in the least possible time
- Enhanced Security and Data Recovery Measures
- Better collaboration among employees because of implementation of Teams
- Support and training services provided by AgreeYa helped in resolving any issues faced by BDG

California Department of Public Health (CDPH)



Client Name	California Department of Public Health (CDPH)
Project Name	Public Portal Website Redesign
Client Domain	Public Health and Human Services Agency
Dates of Engagement	June 21, 2018 – September 30, 2019
Prime or Subconsultant:	Prime
Project Organization Details:	<p>Agile Project Management</p> <p>Client – Client Project Manager, Sponsors/Department Stakeholders, Product Owners, etc.</p> <p>AgreeYa – Project Manager, SharePoint SME, BSA, SharePoint Developers, Testers</p>

Scope of Work
 The California Department of Public Health (CDPH) was seeking professional services from Organizations having extensive experience in enterprise-scale public portal website redesign and modernization. They were looking for these services to complete the first phase of migration of their existing website (<http://cdph.ca.gov>) to a new contemporary web design on the Microsoft SharePoint 2013 platform. CDPH has already selected SharePoint 2013 as a portal solution for addressing their needs and has completed its requirements, logical

design, physical design, and installed and configured all services for the internet, extranet, and intranet farm services consistent with the initial design process.

Solution

AgreeYa leveraged its expertise in the SharePoint domain and provided a certified team of SharePoint experts who reviewed the existing CDPH SharePoint farm architecture, logical, physical design, installed, and configured the required services. This was followed by the next phase where AgreeYa developed the new CDPH internet portal along with recommendations for needed modifications to its baseline SharePoint 2013 governance structure, infrastructure, and configurations as necessary to enhance services of the organization for its customers.

Our team worked with CDPH stakeholders located in Sacramento and Richmond California to complete the redesign and modernization of the site (<http://cdph.ca.gov>). We also provided services for project management, analysis, branding, usability, information architecture, automated workflows, personalization, social media, modern web programming for current browsers and mobile devices, integration with external data sources, automated forms creation, security at all layers, current State of California web accessibility requirements and site code standards and SharePoint 2013 farm administration and application patterns and practices for development

- Developed the site, including standards for visual appearance and content retention
- Implemented and deployed custom features to enhance out of the box SharePoint functionality
- Created custom workflows using SharePoint Designer
- Designed and deployed web parts, features, event handlers, and custom workflows
- Ensured adherence to the high-level work plan defined for the project
- Assisted in designing a governance plan and ensuring that it complies with the best-in-class standards
- Involved in configuring site collections and defining quota templates

Impact

- Provided access to publicly available online services
- Reporting capabilities for the available data helped the organization-wide improvement
- Use taxonomy and content aggregation of information
- Responsive design helped in supporting leading browsers like Microsoft Internet Explorer, Mozilla Firefox, Google Chrome, and Apple Safari on the desktop version and compatible views on mobile/tablet browsers in Apple iOS, Google Android, and Microsoft Windows Phone
- By leveraging social capabilities like blogs, discussion forums, surveys, feeds and other collaboration features of SharePoint helped in providing appropriate information at the user's fingertip

AgreeYa's Proposal for Microsoft 365 Migration Services

- Training and education about SharePoint governance plan helped drive adoption and reduce support costs
- Developed a governance vision, policy, and standards to track compliance which helped to quantify the benefit within the organization

City of Pasadena



“The Exchange Migration and Assessment services provided by AgreeYa helped us immensely in managing our daily workload more efficiently. I would like to thank the entire team for putting up an excellent effort.”

Client Name	City of Pasadena
Project Name	Microsoft 365 Exchange Migration and Assessment
Client Domain	Public Citizen Benefit Organization
Dates of Engagement	June 20, 2017, to April 30, 2018
Prime or Subconsultant:	Prime
Project Organization Details:	<p>Agile Project Management</p> <p>Client – Client Project Manager, Sponsors/Department Stakeholders, Product Owners, etc.</p> <p>AgreeYa – Project Manager, Microsoft 365 Specialist, Microsoft Exchange Migration Specialists, Testers</p>
Scope of Work	<p>AgreeYa provided assessment and implementation services for Microsoft 365 Exchange integration and migration. The aim of the City’s IT department was to consolidate MS Exchange mailboxes from multiple domains into one, new domain. The trust relationship</p>

between old domains was not an option. The process had to be performed automatically, without any impact on City's end users.

The scope of this project included

- Merging of the City's current **on-premises Exchange 2010** based platform into the City's existing **Microsoft 365 Government Community Cloud** tenancy.
- It also involved performing a readiness assessment/ analysis of the current on-premise and Microsoft 365 environments including gathering and developing requirements, developing a migration plan, and executing the approved plan
- The entirety of the on-premises Exchange platform was in scope, consisting of approximately 3,000 mailboxes and nearly 10TB of data archival data including anti-spam and anti-malware capabilities.

Solution

AgreeYa Team performed the following activities as part of the solution

- Migration of the City's on-premises Exchange 2010 based platform into the City's existing Microsoft 365 (Exchange Online) Government Community Cloud tenancy
- Assigned Microsoft 365 G3 licenses, and configured the exchange online environment to ensure the end-user experience is up to City's standards
- Migrated the entire public folder environment with minimal business impact.
- Provided Project Management, Readiness Assessment, Migration, Implementation, Integration, services
- AgreeYa deployment specialists worked side by side with the City's IT staff throughout the migration: building processes, creating scripts, and documenting ways to automate repeatable tasks
- AgreeYa conducted training and maintained a constant line of communication to help the City's IT staff and end-users adapt to the new implementation
- Implemented governance policies to manage own content
- Provide documentation and support services

Impact

- AgreeYa efficiently migrated the City's on-premise Microsoft Exchange Server 2010 SP3 environment to Microsoft 365 Exchange Online environment without any data loss or other disruptions.
- The Microsoft 365 solution increased mailbox sizes by more than a hundredfold
- The larger mailboxes now allow employees to easily share their calendars with outside customers and vendors
- The Microsoft 365 solution also improved collaboration and connected users to a modernized system that is continually updated
- The Microsoft Exchange calendaring and email server provides an enterprise standard to solve the City's collaboration and compatibility issues
- The City users also found Exchange's security and compliance capabilities very attractive

City of Roseville



Client Name	City of Roseville
Project Name	Exchange Migration and MS Teams implementation
Client Domain	Public Benefit Organization
Dates of Engagement	November 21, 2017 – May 31, 2018
Prime or Subconsultant:	Prime
Project Organization Details:	Waterfall Approach Client – Client Project Manager, Sponsors/Department Stakeholders, Product Owners, etc. AgreeYa – Project Manager, Subject Matter Expert, Migration Engineer, Teams Specialist

Scope of Work

AgreeYa was tasked with providing an enterprise-level e-mail migration and infrastructure upgrade for the City of Roseville. E-mail is a business-critical tool for all organizations, and the City of Roseville was in urgent need of an update to their existing e-mail system and infrastructure that would avoid a negative impact on their end-user productivity.

The project for the City of Roseville entailed upgrading their dated Exchange Server 2013 and Windows Server environments to the most current Microsoft e-mail and infrastructure

platforms. The project included the migration of 1,700 end-user mailboxes with the caveat that the end-users could not experience any downtime in the process.

Also, the City of Roseville wanted to implement Microsoft Teams for its employees which offered the advantages of taking collaboration to the team level. AgreeYa in collaboration with the City IT team deployed Microsoft Teams for all employees of the City of Roseville.

Solution

AgreeYa Team as part of the solution did the below work

- Prepared the setup environment and ensured that it meets the system requirement
- Setup the service connection points
- Upgraded the Exchange Server 2013 and Windows mailbox clusters to Exchange Server 2016
- Setup the required SSL certificates
- Setup virtual directories
- Migrated the mailbox data from Exchange 2013 to the new Exchange 2016 mailbox servers.
- Upgraded the backup and virus-protection software to Exchange Server 2016 compatible versions
- Provide secure Outlook Web App (OWA) access to all remote users
- Implemented Microsoft Teams for all City employees
- Provided governance guidelines on how to effectively manage the deployed solution
- Provided administrator and end-user training sessions on how to effectively use the new solution
- Post-deployment support provided for any issues reported by City users

Impact

- AgreeYa not only exceeded all expectations for the project but were also able to position itself as a trusted partner and advisor to the City of Roseville for future information technology solutions
- The key to this project was communication. To ensure that the City of Roseville team did not experience any loss of productivity, AgreeYa Team had to actively communicate with all key members
- At the end of the project, the City of Roseville was a more efficient and productive organization due to its new e-mail and infrastructure environments
- Now deployed City-wide, Teams enables City employees to communicate, collaborate and interact effectively wherever and whenever, even when global circumstances require work-at-home arrangements
- The favorable impact of the implementation of MS Teams provided City employees integration with Microsoft Office, cloud file storage built on SharePoint, and better mobile connectivity

Sacramento Municipal Utility District (SMUD)



Client Name	Sacramento Municipal Utility District (SMUD)
Project Name	Intranet Portal Development and Teams Implementation
Client Domain	Public Utility Company
Dates of Engagement	September 21, 2013 – August 20, 2014; Feb 2019 – Aug – 2019
Prime or Subconsultant:	Prime
Project Organization Details:	<p>Hybrid Agile Project Management</p> <p>Client – Client Project Manager, Sponsors/Department Stakeholders, Product Owners, etc.</p> <p>AgreeYa – Project Manager, SharePoint Architect, SharePoint Developer, Microsoft Teams Specialist, Tester</p>

Scope of Work
 SMUD was using **SharePoint as its platform for the SMUD employee Intranet** and desired to upgrade from SharePoint 2007 Standard Edition to on-premise SharePoint 2013.

Specifically, SMUD was looking for a team with excellent technical skills and business acumen to work on a project on the Microsoft .NET stack and SharePoint 2013. With **proven experience of successfully delivering similar SharePoint-based Intranet upgrades**, AgreeYa was selected by SMUD to take charge of this critical initiative. In addition to the migration, AgreeYa Team was responsible for **investigating the current SharePoint**

custom code/CSS modifications/ branding while working in partnership with SMUD technical staff to develop, execute, and validate a SharePoint content migration process.

Until now, SharePoint was used as the collaboration platform to circulate and edit documents at SMUD. However, a new and modern platform was needed to meet current requirements for data access with a variety of devices, including smartphones and tablets. The new platform needed to enable document sharing with external partners and provide capabilities to edit documents in real-time. The solution also needed a **chat function** for direct communication, and guaranteed secure client access, even from outside the company network. AgreeYa recommended to rollout and implement Teams as part of the solution.

Solution

AgreeYa project team provided technical upgrade with the goal of minimal disruption to the current Intranet design and functionality. Also, to ease the load on IT, SMUD desired to host the upgraded Intranet in the MS Azure platform while leveraging upon the high uptime SLA, secured infrastructure with Disaster Recovery, and lower total cost of ownership.

The scope of work included a diverse mix of development, execution, and validation of a SharePoint content migration process including section and use of a content migration tool to support the upgrade as needed. This required review and revised development to any custom applications, workflows, and forms existing in 2007 to be migrated to 2013 using SharePoint Designer utility.

A solution was developed for the enterprise-wide, automatic deployment of Microsoft Teams. AgreeYa set SMUD's strategic focus on Microsoft solutions and implemented Microsoft Teams from the Microsoft 365 Cloud suite as the ideal solution to meet user productivity requirements. AgreeYa experts supported the rollout, provided governance and advisory services, and, recommended definitions and security controls that were proven in a test environment.

AgreeYa leveraged its expertise around custom .NET/SharePoint developments involving recreation of the workflows to support the upgraded platform. The technology gamut utilized for the engagement included SharePoint, C# (Visual Studio 2010/.NET Framework), AJAX, jQuery, HTML/CSS. Being a migration project, it comprehensively involved SharePoint administration, performance optimization, continuous testing, monitoring, and ongoing optimization of the application, support issue resolution, minor enhancements, knowledge transfer, and reporting.

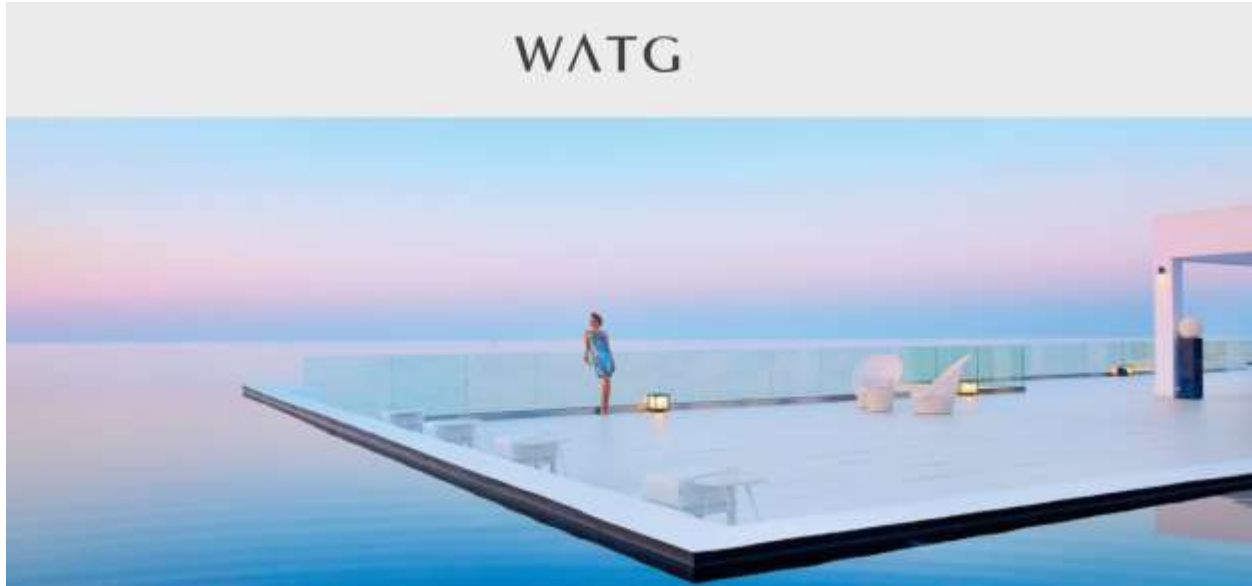
Impact

- Documents & information can be shared and edited quickly & easily because of the rollout of Teams
- Provided ability to smoothly collaborate with external users

AgreeYa's Proposal for Microsoft 365 Migration Services

- Mobile access by tablet & smartphone was easy, even from outside the company network
- Easing of the workload on the internal IT department, as well as savings in hardware resources
- The rollout of Microsoft Teams laid the foundation for additional Microsoft 365 services within the organization
- Enhanced Security and Data Recovery Measures

Wimberly Allison Tong & Goo (WATG)



Client Name	Wimberly Allison Tong & Goo (WATG)
Project Name	Exchange Environment Assessment and Migration
Client Domain	Global Multi-Disciplinary Design Firm
Dates of Engagement	June 10, 2016 – January 25, 2018
Prime or Subconsultant:	Prime
Project Organization Details:	Agile Project Management Client – Client Project Manager, Product Owner AgreeYa - Project Manager, MS Exchange Migration Specialists, Tester
Scope of Work	WATG is a globally recognized award-winning design consultancy firm and specializes in integrated architecture, interiors, strategic planning, etc. To effectively manage their large

Clientele and be on top of their service pyramid, an updated technology was mandated by WATG.

WATG was heavily relying on its email communication platform i.e. **on-Premise Exchange Server 2010**. The platform had become obsolete over the years; thus, it created several issues relating to data security, compliance, and the ability to support growing business demands. This was taking a toll on budget and time as well.

WATG wanted a seasoned technology partner who could assist them in **evaluating various technology options to reduce the overall cost and deliver the best value-added solution** to save the time required to maintain these systems by large margins.

Solution

The project started with the **assessment of WATG's current on-Premise Exchange 2010 environment**. After analyzing the existing issues and creating the inventory of the existing content, the AgreeYa Team **evaluated the different migration solutions and upgrade paths** (Hybrid, Cutover, Staged). Based on our analysis, AgreeYa recommended a **hybrid configuration** with on-premise and online exchange server environments.

The entire mail base, **which included 2200 mailboxes** was not migrated at one go, as it could have taken a toll on the system and there could have been a probability of losing data. Because the client had a huge dependency on mail communication, we decided to **distribute the mails in groups as per their importance, size, and usage**.

Based on groups, we did **batch-by-batch migration** that created a lesser burden. As part of the engagement, WATG's hundreds of mailboxes and other public folders were migrated to Exchange Online, and Microsoft Azure Active Directory Connect was integrated with the existing on-premise active directory for sync-up. AgreeYa Team leveraged a hybrid approach between the on-premise and Exchange online platform to execute this project. Also, Office Pro Plus 2013 & Skype for business was deployed for some Pilot Users using the Active Directory Group Policy Management console.

The key activities that the AgreeYa Team undertook as part of the engagement included:

- Assessment of the existing Exchange 2010 environment
- Evaluation of the Migration solutions and upgrade path
- Created the technical architecture of the migration solution
- Configuration of Exchange hybrid deployment with Microsoft 365 Exchange online.
- Development of step-by-step configuration documentation for Outlook & Skype for business.
- Migration of the entire public folder environment with minimal business impact for all business users.
- Training the end-users on the usage of the new deployment

- Post-migration support for a calendar month to the WATG Exchange Team to ensure a smooth transition to the new Microsoft 365 environment.
- Trained the WATG staff to maintain and manage the new environment.

Impact

- Migration with no loss of data
- More than 80% of mailboxes were moved to the cloud that resulted in higher productivity, efficiency levels, user acceptance, and user experience
- Easy access with bigger mailboxes in the cloud
- Minimum work for local IT team to administrator and manager exchange environment
- Implementation of governance enabled administrators to use group policies, as well as other administration tools, to manage Exchange Online features across their environment

San Diego Unified Port District



“The SharePoint implementation that AgreeYa has carried out have become mission-critical and is a vital component in our ability to achieve our business-efficiency and organization objectives. Thanks to the entire AgreeYa Team on making this happen.”

Client Name	San Diego Unified Port District
Project Name	G3 Microsoft 365/SharePoint Online Intranet Implementation
Client Domain	Self-supporting Public-benefit Transit Corporation
Dates of Engagement	October 01, 2018 – Ongoing
Prime or Subconsultant:	Prime
Project Organization Details:	<p>Agile Project Management</p> <p>Client – Client Project Manager, Sponsors/Department Stakeholders, Product Owners, etc.</p> <p>AgreeYa – Project Manager, SharePoint SME, UX Designer, SharePoint Developers, Quality Analysts, Trainer</p>
Scope of Work	
<p>San Diego Unified Port District (SDUPD) was seeking a technology partner to move from a self-managed, 3rd party hosted Joomla environment to a robust, comprehensive, and collaborating intranet platform based on Microsoft 365 GCC/G3 environment. A switch to the newest version of SharePoint would benefit the transit agency towards the betterment</p>	

of internal processes, assure data security, connect Intranet to mobile devices, generate better ROI, and streamline various processes. The SDUPD sought a partner to help them:

- Migrate the existing Intranet to the Microsoft 365 GCC environment.
- Align the new Intranet to the branding guidelines of the Corporation, while focusing on user self-service delivery strategy.
- Build a contemporary, simple, and clean system with an approachable and friendly look to assist in communication and provide resources that are relevant to employees.
- Boost productivity and efficiency by creating an Intranet that is mobile responsive and accessible from PC, tablet, and smartphone alike.
- Enhance the user experience by logically grouping categories and content most relevant for the user.
- Display information and resources in a clear and easy to understand format utilizing intuitive content organization

Solution

AgreeYa's team of industry-recognized consultants first reviewed and analyzed the existing intranet setup and worked rigorously to implement the required changes. For this engagement, AgreeYa brought together a proven approach with the right tools, a strong team, and a cloud-based industry-wide recognized SP Online solution that reduced the total cost of ownership for SDUPD. AgreeYa drew a refined strategic blueprint and executed the engagement with the following key deliverables

- Development of an intuitive and feature-rich page layout for the main site and microsites.
- Styling of all of custom site elements and dedicated features to provide an intuitive and simple website experience.
- Deployment of SharePoint specialties like custom workflows using SharePoint Designer, to provide tailored data and process flow within the content management system.
- Compliance with ADA Accessibility Laws, so that every user can use the intranet solution with ease
- Governance policies that allow authors to manage their content
- Prepare the migration plan in line with Microsoft best practices
- Supported in developing and configuring several forms using InfoPath
- Training of the identified key staff on SharePoint Online features and benefits

Impact

AgreeYa with its expertise and experience managing similar engagements successfully, achieved the objectives laid down for the project and delivered the engagement within the stipulated timeframe with customers cherishing the benefits of the cloud platform with improved work standards. Also, the move to SharePoint Online helped District to significantly drop the expense and workload of the previous 3rd party hosted systems. Besides, the following key benefits were also realized:

AgreeYa's Proposal for Microsoft 365 Migration Services

- Provided the much-needed features like co-authoring, document sharing, access controls
- Improved collaboration and overall engagement among employees
- Helped in easy document findability which led to increased employee experience and efficiency
- ADA compliance
- Increased savings and business agility
- Single-Sign-On (SSO) feature
- Access to direct Microsoft support

Proposed Staffing and Project Organization

Profiles of personnel assigned to the program, demonstrating experience and qualifications;

After analyzing requirements for the County's "**Microsoft 365 Migration Services**" project, we have selected a group of our **strongest resources** who'll bring several years of experience delivering successful projects of a similar nature.

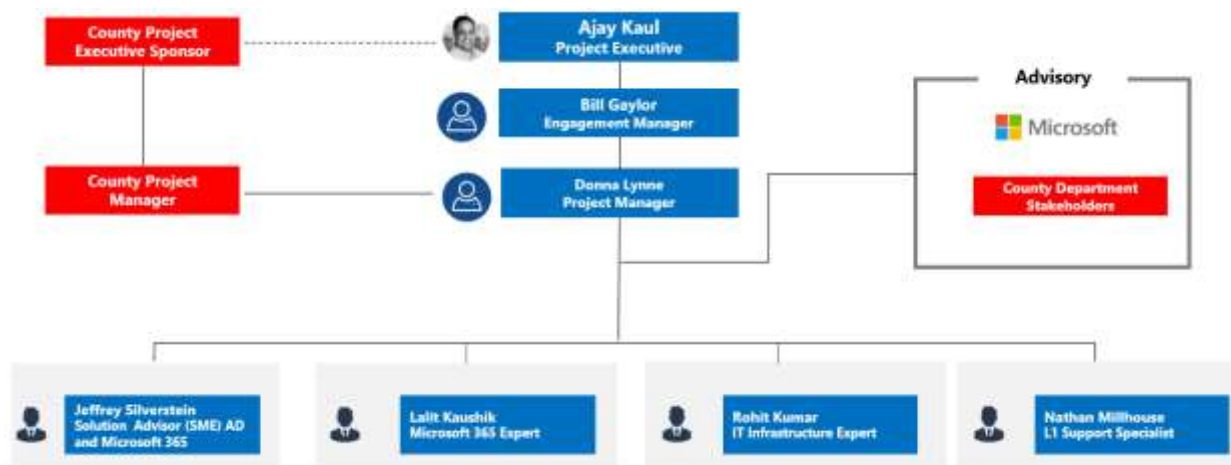
We have been engaged many times over the last two decades to successfully develop and implement similar projects. We bring the **right blend of expertise** required for project success, and we understand the **Public sector** well. Not only that, but we also work with the County as **ONE TEAM**, and we intend to **collaborate closely with the County's key stakeholders**, to work side by side to ensure that **County's** Microsoft 365 platform remains current and relevant in an ever-changing technology market.

Each member of the proposed AgreeYa Team brings extensive experience delivering successful projects of a similar nature. We are committed to a **rigorous, transparent project management approach, user-driven design and development**, and the incorporation of cutting-edge, proven technologies. Our professionals have experience serving a wide variety of **public sector customers** and understand the importance of assessment readiness, FastTrack program implementation, identity management, planning, organization, and collaboration with our Customers' projects.

Our personnel aren't just consultants with strong expertise in Microsoft 365; we're also **Californians – sons and daughters, taxpayers, voters, and volunteers**. We care deeply about the values of our California public sector clients and we work diligently to assist them in achieving their respective missions.

The below graphic describes our **proposed project team** for this engagement. As you can see, the project organization has been designed to enhance **collaboration** between the County's key project stakeholders and our proposed project team, such that the County staff can provide oversight and assistance regarding compliance with existing processes. On top of that, for providing the right project governance, our proposed Engagement Manager, as well as our Project Executive will oversee the project and act as an escalation point for **quick issue resolution and better client relationship management**.

AgreeYa's Proposal for Microsoft 365 Migration Services



Profile Summary of Proposed Team Members

Name	Role	How Resource's Experience Benefits the County
Ajay Kaul	Project Executive	<ul style="list-style-type: none"> As an IT visionary with over three decades of experience, Ajay co-founded AgreeYa in 1999 to provide business and technology solutions to organizations. He has played a pivotal role in growing AgreeYa from a technology start-up to a global system integrator. His unique leadership style, focus on stakeholder value, and strong acumen in assessing change in market conditions have kept the ball rolling for AgreeYa at a fast pace. Under his leadership, AgreeYa has successfully executed several contracts in the public sector. For the proposed engagement, Ajay will be responsible for overall customer satisfaction and act as the top-level escalation point for AgreeYa.
Bill Gaylor	Engagement Manager	<ul style="list-style-type: none"> Bill is an accomplished professional, having executed dozens of programs/projects during a 20+ years of experience on customer-facing engagements in large professional services and consulting environments. He is highly experienced in Delivery management, Strategic Outsourcing management, manage deliverable of large size multi-million-dollar engagements, with emphasis on Account Management, Account Growth, and service delivery management for Microsoft 365 solutions. He has worked for Microsoft as an architect for the Dynamics Program Office and the Worldwide Public Sector Services organization. He assisted many customers in many different

AgreeYa's Proposal for Microsoft 365 Migration Services

Name	Role	How Resource's Experience Benefits the County
		<p>countries (including New Zealand, South Africa, Germany, Saudi Arabia, etc.) successfully implement Microsoft technologies to solve some of their most difficult problems.</p>
<p>Donna Lynne</p>	<p>Project Manager</p>	<ul style="list-style-type: none"> • 24 years of proven IT experience, currently pursuing PhD in Management & Organizational Leadership from the University of Phoenix. Worked with multiple public organizations such as the County of San Diego, Blue Shield, etc. • Strong experience in managing large scale complex projects, in the capacity of Project Manager while delivering best in class solutions and services around Microsoft 365 • Her relevant professional certifications include <ul style="list-style-type: none"> ○ SAFe Release Train Engineer, 2020 ○ SAFe Advanced Scrum Master, 2020 ○ SAFe Agilist, 2020 ○ ITIL v4 Foundations 2019 (v3 2011) ○ Scrum, Product Owner Certified #74423, 2019 ○ PMI ACP #2048782, 2017 ○ PMI PMP #1979061, 2016 ○ Lean Six Sigma Green Belt, 2013 ○ ACE GFI, August 2020 ○ ITIL Expert, pending
<p>Jeffrey Silverstein</p>	<p>Solution Advisor (SME) AD and Microsoft 365</p>	<ul style="list-style-type: none"> • Microsoft Certified Solution Architect with Strong experience in guiding various public agencies with design, configuration, administration, rollout, communication, adoption, and deployment of all Microsoft 365 services in a large enterprise. • Done several migrations from Google Drive to OneDrive and Gmail mailboxes to Exchange Online • He is a client-focused technical advisor with 11+ years of experience in eliminating the unproductive areas of operation, improving the quality of deliverables, driving end-user adoption, and achieving high client satisfaction. • In-depth understanding of the best tools (accelerators) and established industry practices to design frameworks, business processes/models, and setting & achieving software development milestones, Jeffrey will be an asset for the County's initiative. • His relevant professional certifications include <ul style="list-style-type: none"> ○ Microsoft 365 Certified: Messaging Administrator Associate

AgreeYa's Proposal for Microsoft 365 Migration Services

Name	Role	How Resource's Experience Benefits the County
		<ul style="list-style-type: none"> ○ Microsoft Certified Solutions Expert: Messaging (MCSE - Messaging) ○ Microsoft Certified Solutions Expert: Communications (MCSE - Communications) ○ Microsoft Certified Solutions Associate Office 365 certification (MCSA) ○ Microsoft Certified IT Professional: Enterprise Messaging Administrator 2010 (MCITP) ○ Microsoft Certified Technology Specialist Exchange 2010 (MCTS) ○ Microsoft Certified Systems Engineer on Microsoft Windows 2000 (MCSE)
<p>Lalit Kaushik</p>	<p>Microsoft 365 SME/Migration Specialist</p>	<ul style="list-style-type: none"> • Proficient in managing large-scale migrations and improving capacity planning, utilization, and performance of a distributed system, leveraging his technical acumen. • 14+ years of experience in providing subject matter expertise for analysis, design, and Online cloud service deployment using Microsoft 365 and development of enterprise messaging system, email, and VOIP functionality that deliver improved team and enterprise-wide communication. • He has proven success in performing pre-pilot migration to ensure the migration readiness of the infrastructure (firewall ports, network rules, Microsoft 365, SSO, etc.) and deliver excellence in Exchange migration, SharePoint migration, OneDrive implementation through situational analysis and timely resolve of escalating problems
<p>Rohit Kumar</p>	<p>IT Infrastructure and Migration Support Expert</p>	<ul style="list-style-type: none"> • Rohit has over ten (10) years of experience in providing infrastructure and Microsoft 365 and Windows 10 support • Expert in Microsoft system administration tools and processes • Experience in the technical administration of PCs, Server Management, with demonstrated broad-based technical abilities • Server setup (cloud virtual, on-premise physical, and virtual) • He has extensive experience managing Active Directory, MS Exchange Online with Microsoft 365 environment, handling Virtualization on Hyper V and VMware with HA. • He has strong expertise in setting up Group Policy Object capabilities needed for all M365 workloads




































Name	Role	How Resource’s Experience Benefits the County
		<ul style="list-style-type: none"> Ensures network, system, and data availability and integrity through preventive maintenance and upgrade
Nathan Millhouse	L1 Support Specialist	<ul style="list-style-type: none"> Nathan has over three (3) years of experience in providing L1 help desk support He possesses certification in CompTIA A+ and CompTIA Security+ Closed 95% of trouble tickets on the first call without escalation Commended for quickly resolving complex issues including application-related crashes, network slowdowns, connectivity problems, and more. Supervised overall operation of the help desk during migration to Windows 10 Achieved a user satisfaction rating of 4.9/5.0 (14% higher than average); consistently logged and monitored ticket status to ensure fast, quality resolution of every issue. Provided ongoing progress to leadership, system owners, and peers regarding the health of the environment and status of testing

We would also want to emphasize here that our **L1 Support Specialist** along with **AgreeYa Chatbot** that will be deployed for the migration period will temporarily augment the County’s helpdesk team while we are upgrading so that you can take care of any additional issues that might come up during that period. The AgreeYa Chatbot will be deployed without any additional cost to the County **during the migration period** and after the migration, the Chatbot can be removed, if the County doesn’t want to keep that. Else, the license and support cost of Chatbot will be billed separately to the County if they want to continue with the Chatbot after the migration is over based on the positive experience that we are definite that County will experience.

The **Level 2 (L2)/Level 3 (L3) support** during the migration period will be provided by our Microsoft 365 SME, Migration Specialist/Expert, and L1 Support Specialist.

AgreeYa Team's Staff Qualification Matrix

Below, we have mapped our proposed Implementation team's qualifications with a few of the key requirements for the County's project.

	Public Sector Experience	Professional Certification	Application Suite	Exchange Online	OneDrive/Teams	Intune	Enterprise Mobility + Security	MS365 Security Governance
Donna Lynne		Y						
Jeffrey Silverstein		Y						
Lalit Kaushik		Y						
Rohit Kumar		Y						
Nathan Millhouse		Y						

Implementation Team Resume's

Project Manager



Donna Lynne
Project Manager



California
based
Resource

Professional Certifications

- SAFe Release Train Engineer, 2020
- SAFe Advanced Scrum Master, 2020
- SAFe Agilist, 2020
- ITIL v4 Foundations 2019 (v3 2011)
- Scrum, Product Owner Certified #74423, 2019
- PMI ACP #2048782, 2017
- PMI PMP #1979061, 2016
- Lean Six Sigma Green Belt, 2013
- ACE GFI, August 2020
- ITIL Expert, pending

Education

- In progress, PhD, Management & Organizational Leadership, University of Phoenix
- Research: Identifying opportunities to accelerate corporate culture change
- Exec MBA, Business Administration, California State University Monterey Bay, Seaside, CA
- BA, Business Management, University of Phoenix
- BS, Computer Information Systems, Coleman University, Las Mesa, CA

Summary of Experience in Proposed Role

Donna is an **IT veteran** and has been known in the industry for her knowledge and contribution to complex enterprise projects. She is a PMP Certified Project Management professional, with expertise in **managing the full-scale implementation of Microsoft 365, Teams, Office 365 Application Suite OneDrive, Exchange migration, Microsoft Endpoint Manager (Intune), Enterprise Mobility + Security SharePoint Online & On-premise enterprise solutions.** She is equipped Scrum Master with strong experience in facilitating **Agile adoption retrospectives** for the organization with the leadership and guiding teams with the outcome resulting in enhanced performance. She has proven experience in following **Agile Scrum practices** for **project planning**, team/ client management, and execution of enterprise Microsoft365 deployments.

Technical Competency

Microsoft Technology Stack: Office 365 (Teams, Office 365 Application Suite OneDrive, Exchange migration, Microsoft Endpoint Manager (Intune), Enterprise Mobility + Security SharePoint Online, etc.), SharePoint 2019/2016 (Online & On-Premise), SharePoint 2013/2010, MOSS 2007, Microsoft Azure

Databases: MS SQL Server, Azure Synapse/Azure SQL Data Warehouse, Azure Data Factory, Azure SQL Database, MS Access

App Development Tools: MS Visual Studio, Azure DevOps, Azure Developer Tools (Visual Studio, Power Apps)

Analytics Tools: Tableau, Microsoft Azure (Power BI, Databricks, Stream Analytics, Data Lake Storage, Analysis Services)

Languages: C, C++, C#, ASP.NET, AJAX, jQuery, JavaScript, VB.NET

Server: MS Exchange 2013/2016/2019, IIS 7.5

How Donna's Experience Benefits the County



Donna manages AgreeYa's **Center of Excellence (CoE) for Microsoft 365**, committed to developing solution delivery accelerators that expedite the entire product development life cycle & lower the total cost of ownership. She has proven success with a great track record of working with **public & private agencies** such as **Blue Shield of California, City of Fontana**, to name a few, in the capacity of Project Manager while delivering best-in-class solutions and services around Office 365 & SharePoint platform. Strong understanding of **Agile Scrum practices** and her experience managing public sector client projects will also provide an added advantage through this engagement.

Professional Experience

Southern California Association of Governments (SCAG) **May 2021 - Present**

Project: Enterprise BI Datawarehouse; Role: Senior Project Manager

- Creating a central data repository and implementing scalable enterprise wide Power BI Reporting capabilities
- Done requirement gathering workshops for the project
- Refining identification of specific data sources
- Ensuring a robust and comprehensive project plan
- Facilitating architectural and technical planning

California Department of Public Health (CDPH) **Dec 2020 - May 2021**

Project: COVID Program Communication; Role: Senior Project Manager

- Facilitate cross program status updates for multiple projects within CDPH
- Capture and report planned and unplanned outages
- Handling the California COVID Reporting System (CCRS) project and managing the project team
- Created the change process for CCRS system and transitioned the system to steady state production support

Blue Shield of California, El Dorado Hills, CA **June 2019 - Nov 2020**

Project: Application Development & Management; Role: Senior Project Manager/Scrum Master

- Proactively coordinating multiple scrum and waterfall work streams within a project, and multiple projects across the enterprise to surface and address potential risks and collisions of affected applications and components in each release.
- Facilitate scrum ceremonies including grooming, sprint planning, retrospectives, daily stand-ups, etc.
- Produced project definitions to include validated functional requirements, scope, roles, responsibilities, budgets, timescales, and resources
- Enacted continuous improvement increasing the productivity of Scrum teams and the quality of deliverables

DXC Technology, Sacramento, CA **Feb 2018 - May 2019**

Project: Product Development & Management; Role: Sr. Project Manager, Scrum Master & Product Owner

- Developed **project charter** and technical **assessment documents** identifying the project scope, buy vs. build recommendations, resource and budget requirements for development and maintenance, risks and issues, implementation approaches, etc.
- Planned and guided in the product release, implementation activities, etc.
- Created/generated global team utilization reports across all global regions (Americas, ANZ & Asia Pac, Europe) to track current work, and inform management and Sales of work processed and the team's ability to satisfy ongoing validation of proposals.

Centene/Healthnet **Aug 2016 - Feb 2018**

Project: Product Development & Management; Role: Technical Project Manager

- Led efforts to separate project merger contracts and create the individual project plan.
- Facilitated project meetings and took charge to hold topic-specific project status meetings and action item update calls.
- Developed **project charters**, project plans, schedules, work breakdown structures, and deployment plan
- Acted as a **Scrum Master**, working with Product Owners and team members to create product/sprint backlogs, prioritized user stories backlog items based on its business value and ROI. Developed sprints schedules.
- Responsible for **managing staff** to ensure that all milestones are achieved within the agreed timeframes

DXC Technology/CSC/HPE/EDS | Sacramento, CA

Nov 2014 – Aug 2016

Project: Project Portfolio Management; Role: Senior Project Manager

- Directed up to 25 team members in \$500K to \$1.5M agile and waterfall projects to deploy ServiceNow tool to high-profile clients with up to 200K global end-users.
- Formed client relationships, facilitated agile delivery via scrum servant leader and waterfall PM roles, and communicated with client stakeholders on regular basis.
- Created project plans, identified resources, and managed implementation projects to stand up ServiceNow.
- Acted as Voice of the Customer for Fortune 250 clients
- Developed **project charters**, project plans, schedules, work breakdown structures, and deployment plan
- Acted as a **Scrum Master**, working with Product Owners and team members to create product/sprint backlogs, prioritized user stories backlog items based on its business value and ROI. Developed sprints schedules
- Produced project definitions to include validated functional requirements, scope, roles, responsibilities, budgets, timescales, and resources
- Responsible for tracking and reporting the status of the project to stakeholders

County of San Diego

Jan 2009 – Nov 2014

Project: Intranet Site Development; Role: ITO Svcs Delivery Exec, PMO, Infrastructure Ops

- County of San Diego (CoSD) IT Operations & PMO Leadership: Established agile training, accountability, and change management processes across client-facing IT Ops, reduced County IT operational Severity 1 outages 50% and Severity 2 outages 30% in one year. Established collaborative server patching policies (2400 servers) and reduced technical debt.
- Team Leadership: Led data security teams, established/maintained open door polity, set up servant leader brown bag studies/knowledge sharing, initiated blended and collaborative IT Development/Ops team assignments, coached individuals to excel, and successfully cultivated a culture of customer service excellence & transparency. Achieved a retention rate of 100%.
- Kaiser Permanente, PMO & Datacenter Equipment & Project Upgrades: Led 65 team members in IT Ops and project teams to change out older equipment, reducing power load per unit. Took charge to raise on-time project delivery from 12% to 88%.
- California Independent System Operator (CAISO): Took charge of 16-person IT architecture, and engineering team. Oversaw data center and virtualization projects to decrease server footprint by 60% and power requirements by 40% in 8 months.

Other Engagements

ITO Svcs Delivery Exec, IT Engineering, Operations & PMO

1997 –2009

Solution Advisor (SME) AD and Microsoft 365



Jeffrey Silverstein
Solution Advisor (SME) AD and
Microsoft 365



California
based
Resource

Professional Certifications

- Microsoft 365 Certified: Messaging Administrator Associate
- Microsoft Certified Solutions Expert: Messaging (MCSE - Messaging)
- Microsoft Certified Solutions Expert: Communications (MCSE - Communications)
- Microsoft Certified Solutions Associate Office 365 certification (MCSA)
- Microsoft Certified IT Professional: Enterprise Messaging Administrator 2010 (MCITP)
- Microsoft Certified Technology Specialist Exchange 2010 (MCTS)
- Microsoft Certified Technology Specialist Exchange 2007 (MCTS)
- Microsoft Certified Systems Engineer on Microsoft Windows 2000 (MCSE)
- HP/Compaq Accredited Systems Engineer (ASE) Intel/Windows NT Specialist

Education

- Master Degree in Management
- Bachelor Degree in Management Information Systems

Summary of Experience in Proposed Role

Jeffrey comes with twenty-five (25) years of IT experience in Designing, configuring, and implementing an enterprise messaging environment including Microsoft **365, Office Apps, Exchange, OneDrive, MDM (Intune), Enterprise Mobility + Security, SharePoint Governance, and Security**. He has strong experience in **Google Drive to OneDrive** and **Gmail mailboxes to Exchange Online** migration. **AD cross-forest** migration or new forest implementation across all windows server platforms. He has experience in Synchronizing the directories from **On-premises to Microsoft 365 (formerly known as Office 365)** using different Identities as per business needs. He comes with experience in providing support and maintaining **Microsoft Office Outlook Web Access** and Office Outlook, E-mail, Calendaring & Scheduling. He has proven experience in designing and implementing Azure AD, Azure AD Connector, AD FS, OCS to Lync and **Exchange Migrations**, Migration of Exchange servers, Migration to Office 365. He has experience in migration of **Microsoft messaging technologies** of newer versions and Synchronizing Directory from on-premises to Office 365 using different Identities as per business needs.

Technical Competency

Active Directory: AD DS, Azure AD, AD Connect, ADAM, AD LDS, Active Directory Schema, DNS & Group Policy Objects

Microsoft 365: OneDrive, Teams, SharePoint Online, EMS, MDM Intune, Exchange Online Protection (EOP), Exchange Admin Center (EAC), Office 365 Apps, Active Directory Federation Services (ADFS), Azure AD Connect, ATP, DLP & eDiscovery

Exchange: Microsoft Exchange Server 2010, Microsoft Exchange Server 2013, Microsoft Exchange Server 2016, Microsoft 365

Scripting: Microsoft Power Shell 5.0, Microsoft Power Shell 4.0, Microsoft Power Shell 3.0, Automation, Modules: Active Directory, Exchange, Skype-for-Business, Azure, and Windows

Lync/Skype-for-Business: Lync2010, Lync 2013, Skype-for-Business 2015 and Skype-for-Business 2015 Online/Teams Pool-Peering
Virtual Infrastructures: Hyper-V, VMware, Oracle Virtual Box and Virtual Switches, CCNA, Switching, Routing, Network Load Balancing (NLB), MPLS & QoS
Monitoring: SolarWinds, System Center Configuration Manager (SCCM), Wire shark, SCOM, Snooper, Fiddler, Mx Tool Box, ExMon, NetMon & Network Assessment Tools

How Jeffrey's Experience Benefits the County



Jeffrey is proficient in implementing **Microsoft 365 solutions** and **managing large-scale migrations** and improving **capacity planning**, utilization, and performance of a distributed system, leveraging his technical acumen. He has extensive experience in the analysis, design, and **development of enterprise messaging systems**, email, and VOIP functionality that deliver improved team and enterprise-wide communication. He has good experience in Online cloud service deployment using **Office 365** and Azure/Azure AD Connect, with synchronization of services and single-sign-on configuration. He has proven success in performing **pre-pilot migration** to ensure the **migration readiness** of the infrastructure (firewall ports, network rules, Office 365, SSO, etc.) and deliver excellence in **Exchange migrations** through situational analysis and timely resolve of escalating problems.

Professional Experience

Amcor

Feb 2021 – May 2021

Project: Microsoft 365 Assessment, and Rollout; Role: Office 365 Architect

- Performed assessment and discovery of **Exchange Online, SharePoint Online, Teams, OneDrive,** and **Microsoft 365** tenant environment to assess optimization and security best practices
- Delivered assessment and design documentation
- Configured all Microsoft 365 services based on security and business requirements
- Configured Defender for Office 365 and Exchange Online **Protection**
- Configured **Azure MFA with Conditional Access Policies** to support **MFA** rollout to users
- Created **Microsoft 365 Governance Plan** Design document for SharePoint Online, OneDrive, Teams, and Exchange

Teladoc Health

Dec 2020 – Feb 2021

Project: M365 tenant to tenant migration; Role: Office 365 Architect

- Performed assessment and discovery of Active Directory and Exchange environments to assess readiness for **Office 365**
- Delivered assessment, and design documentation for **Exchange Online** and **OneDrive**
- Configured all Microsoft 365 services based on security and business requirements
- Configured Defender for Office 365 and Exchange Online Protection
- Migrated Data Loss Prevention (DLP) policies to new M365 tenant
- Configured Azure MFA with Conditional Access Policies to support MFA rollout to users.
- Implemented **Microsoft Endpoint Manager (Intune)** for BYOD devices
- Configured **MAM and MDM policies** for **Intune**

AgreeYa's Proposal for Microsoft 365 Migration Services

- Created **Microsoft 365 Governance Plan** Design document for SharePoint Online, **OneDrive**, **Teams**, and Exchange
- **Migrated 1500 mailboxes** from Exchange 2016 to Exchange Online using BitTitan MigrationWiz
- **Migrated OneDrive for Business** to the new tenant using BitTitan MigrationWiz
- Migrated **Microsoft Teams tenant to tenant** using Sharegate
- Migrated **SharePoint Online tenant to tenant** using Sharegate

UMASS Memorial Medical Center

Jul 2019 – Nov 2020

Project: Email/Document migration and Security project; Role: Microsoft 365 architect

- Performed assessment and discovery of Active Directory and Exchange environments to assess readiness for Office 365.
- Delivered assessment, and design documentation for **Exchange Online, SharePoint Online, Teams, and OneDrive**
- Configured all **Office 365** services based on security and business requirements.
- **Migrated 17000 mailboxes** from Exchange 2016 to **Exchange Online**
- Implemented Azure-based MFA.
- Implemented Azure Threat Protection (AIP).
- Implemented IBM QRadar for monitoring logs from **Office 365**
- Configured Alerts and Reporting in Azure-based on security requirements
- Implemented Privileged Identity Management (PIM)
- Designed and implemented new RBAC roles.
- Built Azure AD Connect servers, Exchange 2016 management servers, SMTP servers, and Exchange Hybrid servers to support several Office 365 initiatives.
- Migrated Exchange Public Folders to Office 365.
- Decommissioned Exchange 2016 Servers.

Ultragenyx Pharmaceutical

Dec 2017 – Mar 2018

Project: Migrate O365 users to new Office 365 tenant; Role: Office 365 Architect

- Configured and implemented BitTitan MSPComplete to migrate users to new **Office 365 tenant**
- Built pilot to test migration plans for Office 365
- Created migration plan to new **Office 365 tenant**
- Developed and tested PowerShell scripts for migration
- Configured MigrationWiz to migrate accounts to **Exchange Online**
- Remediated migration issues in MigrationWiz
- Migrated 125 mailboxes and archives to **Exchange Online**
- Supported post-migration Office 365 issues.

Teladoc Health

Dec 2020 – Feb 2021

Project: M365 tenant to tenant migration; Role: Office 365 Architect

- Performed assessment and discovery of Active Directory and Exchange environments to assess readiness for **Office 365**
- Delivered assessment, and design documentation for **Exchange Online** and **OneDrive**
- Configured all Microsoft 365 services based on security and business requirements
- Configured Defender for Office 365 and Exchange Online Protection
- Migrated Data Loss Prevention (DLP) policies to new M365 tenant

AgreeYa's Proposal for Microsoft 365 Migration Services

- Configured Azure MFA with Conditional Access Policies to support MFA rollout to users.
- Implemented **Microsoft Endpoint Manager (Intune)** for BYOD devices
- Configured MAM and MDM policies for **Intune**
- Created **M365 Governance Plan** Design document for SharePoint Online, OneDrive, Teams and Exchange
- Migrated **OneDrive for Business** to the new tenant using BitTitan MigrationWiz
- Migrated Microsoft Teams **tenant to tenant** using Sharegate
- Migrated SharePoint Online **tenant to tenant** using Sharegate

UMASS Memorial Medical Center

Jul 2019 – Nov 2020

Project: Email/Document migration and Security project; Role: Office 365 Architect

- Performed assessment and discovery of Active Directory and Exchange environments to assess readiness for Office 365.
- Delivered assessment, and design documentation for **Exchange Online, SharePoint Online, Teams, and OneDrive.**
- Configured all Office 365 services based on **security** and business requirements.
- Migrated 17000 mailboxes from Exchange 2016 to **Exchange Online.**
- Implemented Azure-based MFA.
- Implemented Azure Threat Protection (AIP).
- Implemented IBM QRadar for monitoring logs from **Office 365.**
- Configured Alerts and Reporting in Azure-based on security requirements.
- Implemented Privileged Identity Management (PIM).
- Designed and implemented new RBAC roles.
- Built Azure AD Connect servers, **Exchange 2016** management servers, SMTP servers, and Exchange Hybrid servers to support several Office 365 initiatives.
- Migrated Exchange Public Folders to **Office 365.**
- Decommissioned Exchange 2016 Servers.

PCM

Mar 2018 – Jul 2019

Project: Architect for various Office 365; Role: Messaging Architect

- Performed assessment and discovery of several Active Directory and Exchange environments to assess readiness for **Office 365.**
- Delivered assessment, design, and As-built documentation for **Office 365 migration** projects.
- Built Azure AD Connect servers, **Exchange 2016** Hybrid/Management servers, SMTP servers, and Exchange Hybrid servers to support several Office 365 initiatives.
- Implemented Azure Information Protection (AIP) and Data Loss Prevention (DLP) policies.
- Acted as an escalation point for support issues on various Office 365 projects.
- Implemented Azure MFA for multiple projects.
- Configured SSO with Pass-through authentication using Azure AD Connect on multiple projects.
- Configured OKTA for Office 365 SSO.
- Migrated **Exchange** Public Folders to Office 365.
- Created design documentation for Microsoft Teams.
- Completed a **6000-user migration from G Suite to Office 365** using AvePoint FLY migration tool. **Migrated Google Drive to OneDrive and Gmail mailboxes to Exchange Online.**
- Completed several file server to OneDrive migrations using third-party tools and the **SharePoint Migrator** Tool.

AgreeYa's Proposal for Microsoft 365 Migration Services

Ultragenyx Pharmaceutical

Dec 2017 – Mar 2018

Project: Migrate Office 365 users to new Office 365 tenant; Role: Office 365 Architect

- Configured and implemented Bittitan MSPComplete to migrate users to the new Office 365 tenant.
- Built pilot to test migration plans for Office 365.
- Created migration plan to new **Office 365 tenant**.
- Developed and tested PowerShell scripts for migration
- Configured MigrationWiz to migrate accounts to **Exchange Online**
- Remediated migration issues in MigrationWiz
- Migrated 125 mailboxes and archives to **Exchange Online**
- Supported post-migration **Office 365** issues

Synergy Pacific Management

Nov 2017 – Dec 2017

Project: Migrate Google users to Office 365 tenant; Role: Office 365 Architect

- Configured and implemented Bittitan MSPComplete to migrate users to the new Office 365 tenant.
- Built pilot to test migration plans for Office 365.
- Created migration plan to new **Office 365 tenant**
- Developed and tested PowerShell scripts for migration.
- Configured MigrationWiz to migrate Gmail accounts to Exchange Online.
- Configured MigrationWiz to migrate Google Drive accounts to **OneDrive** for Business
- Remediated migration issues in MigrationWiz
- Migrated 100 mailboxes and archives to **Exchange Online**
- Migrated **100 Google Drive** accounts to the **new tenant**
- Supported post-migration **Office 365** issues

UMass Memorial Hospital

Aug 2017 – Nov 2017

Project: Assist with ADFS and Office 365 deployment; Role: ADFS/Office 365 Architect

- Assessed current ADFS 3.0 environment.
- Ran a comprehensive health check on ADFS
- Identified issues and recommended changes based on **best practices**
- Remediated issues with SSO and **SharePoint** sites.
- Assisted with moving ADFS load balancing from NetScaler to f5.

Lifespan

Jun 2017 – Aug 2017

Project: assist with infrastructure upgrades to support recent migration to Office 365; Role: Office 365 Architect

- Assessed current Active Directory environment.
- Built ADFS 2016 servers to support migration from ADFS 2.0.
- Migrated current ADFS 2.0 applications to ADFS 2016.
- Designed ADFS 2016 proxy solution using Citrix NetScaler.
- Upgraded existing Directory Sync to Azure AD Connect.
- Assisted in the retirement of **Exchange 2010** Hybrid Servers.

Newsday

May 2017 – Jun 2017

Project: Migrate Google users to Office 365 tenant; Role: Office 365 Architect

- Configured and implemented Bittitan MSPComplete to migrate users to the new Office 365 tenant.
- Built proof of concept to test migration plans for **Office 365**.
- Created migration plan for same domain name migration to new **Office 365 tenant**.
- Developed and tested PowerShell scripts for migration.

AgreeYa's Proposal for Microsoft 365 Migration Services

- Configured MigrationWiz to migrate Exchange Online, OneDrive, and Exchange Archive projects.
- Remediated migration issues in MigrationWiz.
- Migrated 1600 mailboxes and archives to **Exchange Online**.
- Migrated 600 **OneDrive** accounts to a new **tenant**.
- Supported post-migration **Office 365 issues**.

S&P Global

Feb 2017 – May 2017

Project: Assist with escalated issues for an international rollout; Role: Office 365 Level 3 Engineer

- Acted as an escalation engineer for all issues related to the **Office 365** rollout.
- Source users were located in Google Mail and **Exchange 2013**.
- Resolved issues related to **Exchange Online**, Skype for Business, and Intune.
- Handled shared mailbox migrations with various permissions issues.
- Assisted in resolving PriorityOne production issues.
- Resolved post-migration issues through **ServiceNow** ticketing system and SFB online sessions

Bioverativ

Jan 2017 – Feb 2017

Project: Migrate Exchange 2010 and Office 365 users from Biogen to new spin-off company Bioverativ; Role:

Office 365 Consultant

- Configured and implemented MigrationWiz to migrate users to the new **Office 365 tenant**.
- Source users were located in **Exchange 2010** and Office 365.
- Remediated migration issues in MigrationWiz.
- Configured Federation for Calendar free/busy and Skype external communication.
- Configured OKTA for SSO.
- Migrated 600 mailboxes to **Exchange Online**.
- Supported post-migration **Office 365 issues**.

Massachusetts Bay Transit Authority (MBTA)

Dec 2016 – Jan 2017

Project: Assist with escalated issues for an international rollout; Role: Exchange architect

- Conducted **Exchange** assessment.
- Created design and build documentation for Exchange 2013 to Exchange 2016 migration.
- Built Exchange 2016 servers. Configured DAG for two datacenter HA and Site resiliency.
- Move CAS services from Exchange 2013 to **Exchange 2016** for coexistence support.
- Implemented pilot group for **Exchange 2016**
- Migrated 1600 mailboxes to **Exchange 2016**

SkyTerra Technologies

Aug 2016 – Dec 2016

Project: Stone Coast Fund Services; Role: Office 365 architect

- Conducted Exchange assessment.
- Identified AD issues using **Office 365** HRC and IdFix.
- Remediated issues in AD and Exchange for readiness to **Office 365**.
- Used Azure AD Connect for directory synchronization and federation with ADFS 3.0.
- Completed **Exchange Online** Hybrid deployment using Exchange 2010 servers.
- Implemented pilot group for Exchange Online.
- Migrated 300 mailboxes to Exchange Online.
- Configured public folder infrastructure for access in Exchange Online.

AgreeYa's Proposal for Microsoft 365 Migration Services

- Migrated Metalogix mailbox archives to **Exchange Online**.

Sensata

Jul 2016 – Aug 2016

Project: Office 365 Infrastructure Design Planning and Assessment; Role: Office 365 Level 3 Engineer

- Held technical assessment and planning workshops for Sensata for migration of 500 users to Government Community Cloud tenant from existing **Office 365 tenant**.
- Made recommendations for message routing to Sensata existing **tenant** and new Government Community Cloud tenant to meet ITAR requirements.
- Gave guidance on **DLP and encryption** for the new messaging environment based on requirements.
- Made recommendations on email co-existence between the **two tenants**.
- Email migration options are given for migrating 500 users to the **Government Community Cloud tenant**.
- Identified blockers for migration and remediation plans.
- Delivered Conceptual Design document to the client.

Other Engagements

Berkshire Hathaway Specialty Insurance	Mar 2016 – Jul 2016
Dell Professional Services	Feb 2016 – Jun 2016
Dimension Data	Dec 2015- Feb 2016
FM Global	Mar 2015- Dec 2015
Harvard University	Dec 2012-Mar 2015
Genzyme Corporation	Mar 2012- Dec 2012

Microsoft 365 SME/Migration Specialist



Lalit Kaushik

Microsoft 365 SME/Migration Specialist

Professional Certifications

- Microsoft Exchange certified professional (exam 70-341)
- ITIL V3 Certification (Conducted by HCL).
- Cisco Certified Network Associate (CCNA).

Education

- Bachelor of Science

Summary of Experience in Proposed Role

Lalit has 14 years of experience with expertise in designing, configuration, administration, rollout, communication, adoption, and deployment of all **Microsoft 365 solutions**. He has strong experience with implementing the **Microsoft 365 Governance & security model**, drafting technical roadmap, and defining the acceptable usage of Microsoft 365 services. He is skilled in planning, configuring, and managing Messaging security, Administrative security, auditing, and implementing different roles in the Microsoft Exchange environments. He has extensive experience with Setup, Configuration, and Migration of **Exchange** and implementation of **OneDrive for business** in large complex technical environments. He has good experience in providing **technical advisory** as per **best practices** based on industry standards concerning Office 365 full-stack operations. He has proven experience in delivering one-on-one and group sessions for SharePoint Online, **Teams**, OneDrive for Business, and **Office 365 Groups**.

Lalit comes with vast hands-on experience on **Exchange Online, SharePoint Online, OneDrive for Business, MS Teams, Security & Compliance, Reporting & Auditing, Intune, Enterprise Mobility & Security (EMS)**. He has good experience in providing technical solutions to business requirements and strong experience in customer/client-facing business environments.

Technical Competency

Microsoft Technologies: Microsoft 365, SharePoint Online, OneDrive for Business, MS Teams, Security & Compliance, Reporting & Auditing, Intune, Enterprise Mobility & Security (EMS), PowerShell, Active Directory, Azure ADConnect (DirSync), ITIL, Team Foundation Server, IDFIX, Exchange Migration Tool, Exchange Admin Console, Exchange Online Protection (EOP), Active Directory Federation Services (ADFS)

Active Directory: AD DS, Azure AD, AD Connect, ADAM, AD LDS, Active Directory Schema, DNS & Group Policy Objects

Office 365: Exchange Online Protection (EOP), Exchange Admin Center (EAC), Office 365 (One drive for Business, SharePoint), Active Directory Federation Services (ADFS), Azure AD Connect, ATP, DLP & eDiscovery

Exchange: Microsoft Exchange Server 2010, Microsoft Exchange Server 2013, Microsoft Exchange Server 2016, Coexistence, Federation, Database Availability Group (DAG) DAC Mode, CAS Array

Scripting: Microsoft Power Shell 5.0, Microsoft Power Shell 4.0, Microsoft Power Shell 3.0, Automation, Modules: Active Directory, Exchange, Skype-for-Business, Azure and Windows

Lync/Skype-for-Business: Lync2010, Lync 2013, Skype-for-Business 2015 and Skype-for-Business 2015 Online/Teams Pool-Peering

Virtual Infrastructures: Hyper-V, VMware, Oracle Virtual Box and Virtual Switches, CCNA, Switching, Routing, Network Load Balancing (NLB), MPLS & QoS

How Lalit's Experience Benefits the County



Lalit has been actively providing his migration/implementation services and subject expertise to **public agencies** to develop strategies and **governance programs** for user adoption around **Microsoft 365 environments** that are in alignment with the projects. He has expertise in providing solutions for **high availability** in Microsoft Exchange and stakeholders in the areas of solutions planning, impact analysis, IT risk & **readiness assessment** while incorporating known regulatory issues. He has proven success in coordinating with business units to incorporate **Microsoft 365** and cloud-based solutions into business operations.

Professional Experience

Southern CA Association of Government

Mar 2021 – May 2021

Project: MS Team Governance Implementation, Role: Microsoft 365 Escalation Engineer

- Supported migration and co-existence of multiple **Active Directory Exchange** email organizations that include facilitating application server migrations to a new AD domain and forest
- Leveraged Active Directory and **Exchange Migration** suite to migrate users, workstations, servers, and Exchange mailboxes
- Implementing Governance and recommendations for MS Teams.
- Implement and configure features of MS Teams
- Migrated Microsoft Exchange 2010 on -premises to Exchange 2016 on -premises, as well as Lync 2013 server to Skype for Business Server 2015
- Activated, upload, and install both enterprise applications and proprietary software that consists of the **Microsoft Office Suite** such as Word, Excel, PowerPoint, Skype, OneNote, and Outlook

AgreeYa Solutions

Feb 2021 – Mar 2021

Project: O365 Best Practices Implementation Role: Office 365 Expert

- Managed **Office 365** cross-tenant migration, migrating all users, mailboxes, applications, and data to the new tenant domain
- Merged objects into **Active Directory** through Active Directory Domain Services (AD DS) consolidation
- Implementing Security best practices around **Microsoft 365**

AgreeYa's Proposal for Microsoft 365 Migration Services

- Implementation of DLP policies to prevent sensitive information sharing
- Implementation of several Alert policies
- Created master list of user mailboxes you want to migrate and created **mailbox mapping** .CSV file for the **migration tool** to match the source mailbox with the target tenant mailbox when migration occurs
- Created **users, groups**, and other objects in Office 365
- Led integration of MS Productivity tooling such as Office 365, **OneDrive** for Business, Skype for Business, etc. with third-party applications

SF Motors

June 2020 – Feb 2021

Project: Migration of Exchange to O365; Role: Microsoft 365, Exchange and OneDrive Lead/SME

- Assisted in migration of **Exchange** coexistence to hybrid coexistence with **Office 365**
- Prepared current Exchange email environment for migration by preparing to Exchange Server with updates and patches.
- Used IdFixTool to detect and correct issues on **Active Directory** before the migration
- Providing escalation support as L3 for **O365** EXO, SPO, and MS Teams
- Responsible to prepare slide deck to present to the client for review
- Reviewing cases and auditing to maintain case and project hygiene
- Consulted on litigation holds and eDiscovery capabilities within **Office 365**
- Re- configured **AAD Connect** and configured ADFS to meet **Exchange Online** requirements
- Setup **hybrid environment** and moved mailboxes to office 365 in a phased migration to various mailboxes in batch and verified each batch immediately

AgreeYa Solutions

Aug 2019 – May 2020

Project: On-Premise to Office 365 Exchange Migration; Role: Technical Advisor/SME Exchange Migration

- Provided technical advisory services and subject matter expertise to remove bottlenecks for **Exchange server migration to Office 365**
- Responsible for implementation of Hybrid deployment with **Exchange 2010 SP3 and Exchange Online**
- Led Mailbox/Shared mailbox and public folder migration using both Microsoft Native method and 3rd party tools such as migrationWiz and Quest
- Provided support to **Microsoft O365** Enterprises customers for EXO, MailFlow, and Identity & Cloud-related issues. Worked on Microsoft CAP, and MSSolve ITSM tools.
- Configured secured **Hybrid mail flow** and created advanced **governance plan** for messaging records in Exchange Online

HCL Technologies

Aug 2011 – Apr 2015

Project: Exchange to O365 migration; Role: SME (Exchange + Microsoft 365)

- Led migration of more than 300,000 mailboxes to **Office 365**
- Handled **Exchange Database Backup** related issue on Data Protection Manager (DPM) servers
- Checked **Exchange database** replication and health on a daily basis
- Delivered new global service desk transition for Staples from Framingham USA, and Netherlands based client locations
- Delivered new global service desk transition for FedEx from Cary, and Morrisville USA-based client location.
- Have handled a team of 40+ service desk resources. Have worked on the SNOW ITSM tool.
- Handled **hybrid set up** for client with **Office 365 and Exchange servers**
- Handled Exchange Online, Exchange 2010 and Lync Online, OCS, and Skype for business with regards to migration, management, dealing with daily technical issues

Other Engagements

AgreeYa Solution, Inc.

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AgreeYa's Proposal for Microsoft 365 Migration Services

Search Value ITES	Mar 2011 – Aug 2011
Sherwood College of Management	Jul 2009 – Mar 2011
ICFAI Foundation	Sep 2006 – Jun 2009

IT Infrastructure and Migration Support Expert



Rohit Kumar
IT Infrastructure and Migration
Support Expert

Professional Certifications

- Microsoft Certification – Solutions Associate Windows Server 2016 Charter Member

Education

- Bachelor Degree in Engineering

Summary of Experience in Proposed Role

Rohit is a **Microsoft certified professional** with over ten (10) years of experience in implementing, designing, and **supporting** technologies and different **Microsoft products** including **Exchange 2016/2013, Microsoft 365, Teams, Planner, OneDrive, Yammer, Skype for Business, Lync, etc.** He has excellent experience in designing, configuring, implementing, and maintaining an **enterprise messaging environment** including Office 365, & Exchange 2016/2013/2010 using ECP or EAC (Exchange Admin Center). He has strong experience in **configuring**, deploying the Mailbox servers, cloud virtual, on-premise physical, and virtual servers, and supporting the end-user production environment with implementing and **maintaining an active directory** environment. He has in-depth knowledge of deployment and **execution strategies** with strong technical acumen for planning, configuring, and managing Messaging security, Administrative security, auditing, and providing solutions for **High Availability in Microsoft Exchange Servers**. He is skilled in designing and implementing Active Directory cross-forest migration or new forest implementation across all Windows server platforms. He has good experience in public folder creation, replication, rights assignments, free busy related issues, offline address book, and Calendaring services. He is also skilled in **determining system specifications**; input/output processes; and working parameters for hardware/software compatibility.

Technical Competency

Cloud Technologies: Office 365, ADFS, Directory Synchronization, Microsoft Azure

Messaging System: Lync 2010/2013, Exchange 2016/2013/2010, Microsoft Office365

Scripting Languages: PowerShell

Web Application Server: IIS, SharePoint 2016/2013/2010

Other: SQL Management Studio, Remote Desktop, Microsoft Lync, LogMeIn, Microsoft CRM, Windows 2010/2008/2007

How Rohit's Experience Benefits the County



Rohit is a team player with strong experience in **providing guidance** and recommendations regarding **technical processes** and procedures. He has successfully supported large complex **Exchange Messaging System** infrastructure for various public agencies including WA Pierce Transit, and the City of Pasadena. He is a Microsoft-certified professional with a proven ability to manage elements of the **current infrastructure** to ensure **high availability** and optimal performance in an integrated environment.

Professional Experience

Pierce Transit, WA

Sep 2018– May 2020

Project: Public Information Portal Development; Role: Senior Support Engineer

- Responsible for **setting up** SharePoint Online production environment
- Configured Site Collection, Sites, Libraries, and Pages in SharePoint Online environment
- Provided ongoing progress to leadership, system owners, and peers regarding the health of the environment and status of testing
- Supported and documented the implementation of approved changes to **system configurations**, software, and **infrastructure** within the approved testing schedule
- Build Squid Proxy in Azure VM
- Configured Active Directory domain authentication
- Configured Internet Restriction Policy
- Configured Security Groups for user assignment

City of Fontana

Dec 2019 – May 2020

Project: Intranet Development; Role: Senior Project Manager

- Responsible for delivering an enjoyable and seamless onboarding experience to **Microsoft Teams**.
- Validated server backups, antivirus protection, monthly **patching**, and **security policies**.
- Leveraged **PowerShell scripts** to add new users, disable user accounts, reset passwords, modify user groups, retrieve AD group membership details, and perform auditing of user access history
- Resolved **helpdesk tickets** promptly and ensured a high availability environment.
- Helped coordinate, document, and communicate scheduled **maintenance activities** to stakeholders.

Wimberly Allison Tong & Goo (WATG)

Apr 2018 – Oct 2018

Project: Exchange Server 2010 to Exchange Online (Office 365) Migration; Role: Infrastructure Support Engineer

- Assessment and migration from **Microsoft Exchange Server 2010 SP3** environment to **Exchange Online** (Office 365) platform
- Development of step-by-step configuration documentation for Outlook & Skype for business.
- Led migration of entire **public folder** environment with minimal business impact for all business users.
- Provided **post-migration support** for a calendar month to the **WATG Exchange Team** to ensure a smooth transition to the new Office 365 environment.
- Trained the WATG staff to maintain and manage the new environment
- Evaluated various technology options to **reduce the overall cost** and deliver the best value-added solution

AgreeYa's Proposal for Microsoft 365 Migration Services

City of Pasadena

Mar 2018 – Jun 2018

Project: On-Premise to Office 365 Exchange Migration; Role: Infrastructure Support Engineer

- Performed hybrid configured on-premise exchange to O365 Exchange Online
- Migrated on-premise mailboxes to **O365 Exchange Online**
- Synchronized accounts between on-premises Active Directory and **Office 365 Exchange Online**
- Created **migration endpoints** to ensure successful migration of mailboxes
- Conducted pre and post-migration checks to ensure a successful migration to O365 Exchange Online

ELI Research

May 2015 – Dec 2017

Project: SharePoint Online Migration; Role: Senior Support Engineer

- Supported in **migration** of SharePoint environment with multi-server structure, about 200 current users, and about 100GBs of data, from an old server & SharePoint 2010 to SharePoint Online using ShareGate - SharePoint Migration Tool
- Working within the Collaboration Services SharePoint Team, provided production support for SharePoint platform, **Microsoft Teams**, and **OneDrive**.
- Held technical assessment and planning workshops for Office 365.
- Provided Office 365 technical support and guidance.
- Supported on-boarding activities for Exchange Online, SharePoint Online, Skype for Business, OneDrive for Business, and Yammer.
- Resolved connectivity issues for remote users while managing **upgrades, backups**, server configuration, remote mail, security, and software **troubleshooting**
- Created Active directory on Windows Server 2012 R2 and Office 365
- Managed Hyper-V 2012 R2 cluster and Virtual Machine Manager 2012 R2
- Created New Cloud in Virtual Machine Manager 2012 R2
- Managed Virtual Machine Manager Library for New Cloud
- Created New VM templates as required for new Cloud
- Managed VCenter Servers
- Created VMs on EXI host
- Managed Remote Desktop Service
- Created new RDSH Collection as per requirement

Aptara

May 2013 - Apr 2015

Project: Managed Services; Role: Support Engineer

- Configured new Active Directory, DNS, and GPO
- Configured SQL server
- Configured Webserver
- Created monitoring alert
- Managed and deployed SCCM and utilized the same to create new **machine images**
- Implemented **package updates** for the organization's golden image using SCCM
- Utilized SCCM to deploy created images on new machines for organization
- Performed management and **troubleshooting** of various Hyper V and **VMware machines**
- Performed deployment monitoring, environment monitoring, and patch management SCCM

Wipro

Feb 2010 – Apr 2013

AgreeYa's Proposal for Microsoft 365 Migration Services

Project: Request Queue System; Role: Support Engineer

- Used Windows Server **Active Directory** to create and assign initial login information for windows-based company users
- Performed network resource monitoring using Cisco Meraki cloud to **ensure stability** and reliability of the internal network
- Created and managed various Windows Server/Windows OS instances on AWS or Microsoft Azure for DevOps
- Configured a Windows Server role to manage print and documentation services for windows-based users of the organization
- Maintained **security patches** and **group policies** on Windows server, W8/10, and OSX systems to decrease chances of network and software vulnerabilities

L1 Support Specialist



Nathan Millhouse
L1 Support Specialist



California based Resource

Professional Certifications

- CompTIA A+ (July 2017 – 2020)
- CompTIA Security+ (July 2017 – 2020)

Education

- Unitek College | GPA: 4.0/4.0 - Sep. 2017
- Courses completed in: Networking, Windows Support, Windows Server 2012, Cloud Infrastructure, and Security.

Summary of Experience in Proposed Role

Nathan has over three (3) years of experience in providing help desk support for 4 branch locations in California, New Jersey, and Georgia and providing L1 support to over 1700 other users in various geographies when needed. Assist with administering and supporting all aspects of IT infrastructure, including Microsoft 365 applications, Windows servers, Meraki network routers, and access points, and Avaya IP Office. Responsible for maintaining a friendly and transparent relationship between IT and other departments, as well as external clients and vendors. He is **supporting L1 issues** for **Microsoft products** including **Exchange 2016 and Exchange Online, Teams, Planner, OneDrive, Yammer, Skype for Business, Lync, etc.**

Technical Competency

Active Directory, Windows Server 2008 – 2019, Windows 10, iOS/Mac, PowerShell, Hyper-V, Basic TCP/IP, DNS, DHCP, Cyber Threat Mitigation, Microsoft 365, Dynamics 365, Azure/AWS familiarity, Network Troubleshooting

How Nathan's Experience Benefits the County



Nathan is a team player with strong experience in **providing guidance** and recommendations regarding **technical processes** and procedures. He is a local to CA region with a good understanding of public agencies' L1 helpdesk support processes and security policies. He has successfully supported large complex **Microsoft 365** helpdesk infrastructure support for internal and external customers.

Professional Experience

AgreeYa Solutions

Nov 2017– Present

Project: Multiple for Internal and External Stakeholders; Role: Help Desk Support

- Responsible for Level 1 Software Troubleshooting & Problem Solving
- Providing L1 Phone & Email Technical Support for Microsoft 365 applications
- Escalated help desk tickets to Level 2 support when outside the scope of L1 technician support
- Phone, email, walk-up, and inbound ticket queue support for incoming employee IT service requests
- Resolution of first-level IT service requests over the phone, email, screen sharing, and through trouble tickets

AgreeYa's Proposal for Microsoft 365 Migration Services

- Monitor internal system notifications for a proactive response, and communication of any outages or system downtime
- Active Directory user administration, password resets, and unlocks
- Remotely install and configure software
- Remotely connect and diagnose PC/hardware/Windows problems
- Developed and implemented an automated backup solution using PowerShell and Windows Server Backup.
- Executed infrastructure upgrade, properly documenting all changes and ensuring server loads were equally balanced.
- Implemented multiple PowerShell scripts to automate informational reports and audits from Active Directory.
- Installed and configured System Center Configuration Manager (SCCM) for extensive testing.
- Configured FreeNAS for use as a data storage server, utilizing SMB to integrate with a Windows environment.
- Rewrote VBS email signature script using PowerShell for enhanced compatibility and future-proofing.
- Assisted with planning and executing a data center move, ensuring proper shutdown, movement, and restoration protocols were observed while maintaining minimal downtime.
- Supported and documented the implementation of approved changes to system configurations, software, and infrastructure within the approved testing schedule
- Accurately resolved hardware, software, and network issues, and ensured proper prioritization, documentation, and root cause analyses were performed.
- The supervised overall operation of the help desk during migration to Windows 10
- Assisted in the design and implementation of a new help desk
- Acted as a technical support mentor to help desk analysts and desktop support technicians
- Installed and configured Windows 10 servers with Microsoft SQL Server for the new call management and tracking
- Configured systems for new users with standard build, as well as specialty programs dependent upon user responsibilities.
- Ensured accuracy of user and computer information in Active Directory, with weekly reporting to observe any discrepancies.
- Performed and maintained workstation inventory.
- Inventoried and documented servers and computers for increased awareness of company assets.
- Completed routine analyses of department procedures in order to determine the benefits of automation.
- Awarded "Star Employee" two times for delivering outstanding technical support and customer service.

RFP Exception List

List all exceptions to this RFP and related attachments.

Following are some of our **suggestions** for the terms and conditions given in the “**Attachment C - Sample Agreement for Services**” which we would like to discuss further with the County.

Contract Page/ Article Number	Concerned Verbiage	Observation/Comment
Page 5/Article X	<p>In addition to the above, should the Board of Supervisors during the course of a given year for financial reasons reduce or order a reduction in the budget for any County department for which services were contracted to be performed, pursuant to this paragraph in the sole discretion of County, this Agreement may be deemed to be canceled in its entirety subject to payment for services performed prior to cancellation.</p>	<p>Suggestion – Please also add the following to Article X after the last paragraph.</p> <p>In such event, the County will pay the Consultant the reasonable costs incurred in the performance of the work terminated, including initial costs and preparatory expenses allocable thereto., in addition to any cost attributable to Deliverables or services till the effective date of termination or cancellation of the services.</p>
Page 5/Article XII	<p>Section A</p> <p>That the party in default has ten (10) days upon receiving the notice to cure the default (Time to Cure).</p> <p>If the party in default does not cure the default within ten (10) days of the Time to Cure, then such party shall be in default and the party giving notice may terminate the Agreement by issuing a Notice of Termination.</p>	<p>Suggestion - Please change ten (10) days to thirty (30) days</p>

Contract Page/ Article Number	Concerned Verbiage	Observation/Comment
Page 7-8/Article XV	<p>Indemnity To the fullest extent permitted by law, Consultant shall defend at its own expense, indemnify, and hold the County harmless, its officers, employees, agents, and volunteers, against and from any and all liability, claims, suits, losses, damages, or expenses of every name, kind and description, including attorney's fees and costs incurred, brought for, or on account of, injuries to or death of any person, including but not limited to workers, County employees, and the public, or damage to property, or any economic or consequential losses, which are claimed to or in any way arise out of or are connected with the acts or omissions of Consultant or its officers, agents, or employees in rendering the services, operations, or performance hereunder, except for liability, claims, suits, losses, damages or expenses arising from the sole negligence or willful acts of the County, its officers and employees, or as expressly prescribed by statute. This duty of Consultant to indemnify and save County harmless includes the duties to defend set forth in California Civil Code Section 2778.</p>	<p>Suggestion - Please add the following instead of the highlighted word in RED font - negligent acts or willful omissions</p> <p>Suggestion - Please remove the highlighted part in the YELLOW</p>

3. Project Specific Requirements

Explanation of FastTrack Methodology

A comprehensive explanation of the Fast-Track Methodology in accordance to an estimated recommendation of the type of Fast-Track Program suitable for this engagement, considerate of scope and County's subscription enrollments or equivalent demonstrable approach.

AgreeYa plans to leverage **Microsoft FastTrack** service to design, plan, and roadmap along with performing the actual migration, where AgreeYa will act as liaison to Microsoft, monitor the progress, provide status reports to the County as well as handle any exceptions/challenges on behalf of the County. FastTrack is a Microsoft service that's included in the County's subscription cost. Under FastTrack, Microsoft performs specific data migration activities on behalf of the customer for those with 500 or more licenses. Based on the Assessment and Discovery reports, AgreeYa will be designing, planning, and preparing the roadmap exploring the MS FastTrack services. AgreeYa will be performing the actual Migration work in collaboration with MS FastTrack Team.

AgreeYa's Microsoft FastTrack Partnership will significantly bring down the total cost of the project. Being a Microsoft FastTrack partner, AgreeYa will collaborate with Microsoft Engineers in this project and leverage Microsoft tools and templates for fast-tracking the delivery (It's only accessible to the selected list of partners like AgreeYa).

As an approved **Microsoft FastTrack Ready partner**, AgreeYa has direct engagement with Microsoft engineering - a team of experts from across various disciplines to assist with complex technical scenarios, and advanced workload guidance. AgreeYa has direct access to and works alongside, local California Microsoft Technical Specialists. In addition, AgreeYa has access to FastTrack best practices, tools, templates, and training to ensure project success.

Using FastTrack service, AgreeYa will leverage Microsoft to help County to plan the transition from Gmail and Google Calendar to Microsoft Outlook and MS Exchange Online, Google Docs and Google Drive to Teams, OneDrive and SharePoint, Configure OneDrive for Business, and leverage Microsoft data migration services to migrate County's user data. In collaboration with County, AgreeYa will create and schedule the migration events and Microsoft will launch migration events following the schedule. When the migration events are complete, County can expect files from appropriately scheduled and eligible sources of the source environments that have been migrated to OneDrive for Business and other workloads.

We will also be leveraging Software Assurance vouchers to cover the Assessment/Planning part of the project. In short, our partnership status with Microsoft brings in cost-effectiveness for the County.

The following is a typical migration FastTrack methodology that follows Microsoft's best practices guidance:

1. Select a small set of users for a **pilot migration** which is assumed to be 80% of the users from the IT team for better feedback. The goal of the pilot is to validate the process, including performance, user communication, and to get a sample of user feedback.
2. **Perform the pilot migration.** This would use an incremental migration method, in which migration happens in the background with no user impact, followed by a cut-over event and the users are directed to use the target Exchange Online, SharePoint Online, OneDrive, Microsoft Teams, Project Online, and other required Microsoft365 features that are in the migration scope. This method is preferred because it reduces user impact.
3. **Understand the data** from the **pilot migration** to determine the remainder of the migration schedule and make any changes. For example, you might update your user communication template to address a question that you received from a pilot user.
4. **Perform the remainder of the migration.** This should also follow an incremental migration method, just like the pilot. Microsoft recommends a single cut-over event for all users to switch to OneDrive for Business. This approach helps to eliminate any confusion that results from users collaborating using OneDrive.
5. We will provide the required **guidance on data migration** to Microsoft 365 by using a combination of tools and documentation and by performing configuration tasks where applicable and feasible for SharePoint Online and provision users.
6. Utilizing the currently onboarded **Azure Active Directory** (AD) provide a foundation for onboarding online services like AD Premium, Intune, and Azure Information Protection.
7. For County, Synced identities will be configured to use MS Intune as MDM authority.
8. Configure firewall ports and set up DNS, including the required Autodiscover, sender policy framework (SPF), DKIM, DMARC, and MX records, as needed for **Exchange Online**
9. Provision users and licenses to enable **Exchange Online, Microsoft Teams, Microsoft OneDrive for Business, and SharePoint Online** functionality.
10. Add the **Project Online** service to your tenant (including adding subscriptions to users). Verify basic Project Online functionality by creating a project.
11. Configure **Exchange Online Protection** and **Advance Threat protection** policies: Define EOP and ATP policies to set the appropriate level of protection for the County users.
12. We will configure **ADFS** authentication to federate the domain with Microsoft365 and other desired applications for single sign-on.
13. We will configure only approved client apps to be used e.g. **Outlook for iOS and Android, Microsoft Teams, and OneDrive for Business.**
14. **Configure Microsoft Edge** (using group policies or Intune app configuration and app policies).

Perform Content Migration Remediation

We will also perform **Remediation if needed on all the migrated content** before passing it to the County Users for UAT. This will cover issues related to the migrated content including but not limited to any data that is not migrated due to the issues with source data such as files and folders with specialized characters, file length, etc.

UAT training, UAT & Fixes

AgreeYa Team would create test scenarios and provide issue resolution support based on User Acceptance Testing (UAT) feedback and results. County will be responsible for user acceptance planning, test case development, and testing. We will assist County in conducting User Acceptance Testing (UAT) with a group of identified users against the defined test cases. We will also provide a remedy to any issues/defects identified, to ensure a successful migration.

Project Management Plan

Define and deliver the Project Management Plans (Risk/Issue Management, Communication Plan, Schedule Management, Resource Management and Stakeholder Engagement, and Governance)

Below we have described the specific Project Management strategies that will be utilized by AgreeYa to assure that services are provided efficiently and satisfactorily.

Project Management and Governance Plan

From our past experiences of executing similar projects, we have learned that any project's success, specifically complex ones', depends heavily on **how efficiently the whole project gets managed**. Project Management is an ongoing task throughout the entire duration of the project and applicable to all the tasks. It requires recurring activities to ensure smooth product delivery. We understand and appreciate that effective project management practices are critical to the success of this initiative. Therefore, we invest a great deal of time, energy, and thought into how this project will be managed to produce the best possible outcomes for the County. This would start with the creation of the detailed project charter, continues with the implementation and monitoring of those plans until the sprint closeout phase.

Initial Project Plan - Key personnel on the AgreeYa project staff will work with the County to create a detailed project plan with fixed deadlines. AgreeYa Team would prepare and provide a detailed Gantt chart-based timeline for this project including specific tasks and subtasks for collaborative discussion. The project plan will with periodically revised and updated to show progress and add detailed tasks and associated timeline.

Risk/Issue Management and Mitigation Plan

A key factor in the success of any project is the identification of the risks a project might encounter and the implementation of a framework to mitigate those risks. This is achieved by establishing the base service levels for all process indicators along with the development of risk assessment plans for all major areas of the project.

Our SUMMIT™ risk management model consists of five steps. These are:

- Identify

- Analyze & Prioritize
- Plan & Schedule
- Track & Report
- Control

This process allows the project team to develop the initial risk management plan. Additionally, the risk management plan is reviewed periodically.

Risk/Issue Management

- The following general procedure will be used to manage active project issues and risks during the project:
 - **Identify:** Identify and document project issues (current problems) and risks (potential events that impact the project)
 - **Analyze & Prioritize:** Assess the impact and determine the highest priority risks and issues that will be managed actively
 - **Plan & Schedule:** Decide how high-priority risks are to be managed and assign responsibility for risk management and issue resolution
 - **Track & Report:** Monitor and report the status of risks and issues and communicate issue resolution
 - **Control:** Review the effectiveness of the risk and issue management actions
- Active issues and risks will be monitored and reassessed every week. Mutually agreed-upon issue escalation and risk management processes will be defined at the outset of the project.

Change Management Plan

Our years of successful experiences working on complex State projects are the result of our established change management plan that assists our team in monitoring any potential changes that could occur during the project. Any such change request is further managed and controlled by the Project Management Office and Change Control Board, to prevent increased cost, delayed delivery schedule, and decreased quality of the overall solution. Our change management plan provides a method for tracking changes, evaluating impacts, and communicating changes.

AgreeYa understands that a project of this magnitude will have a significant impact on how things are done at the County currently. Proactive preparation is important to embrace these changes. An essential element in the preparation for this onslaught of change is a meticulous **change management plan**.

The Change Management Approach will be apparent **throughout the entire project lifecycle** and would provide a method for **tracking decisions, evaluating impacts, and communicating changes**.

AgreeYa will Develop and Deliver Change Management Plan for County. **The key deliverables for this task would be:**

1. Capture Desired business outcomes to evaluate project success
2. Adapt to any new behaviors or actions required by the customer to achieve the business outcome
3. Establish KPIs to measure adoption of Microsoft 365 workloads versus goals

The key outcomes of the Change management Plan:

1. Increase the probability of project success
2. Manage employee resistance to change
3. Capture people dependent ROI
4. Build change competency into the organization

The overall goal of the Change Management Plan is to help employees prepare for and embrace change and to work in new ways to achieve the business objectives.

Change management will:

- Minimize negative impact on business - no surprises to your business or business partners
- Increase the likelihood of attaining strategic goals and value propositions
- Prepare the workforce for change
- Create the climate for ongoing change and business improvement

AgreeYa has a tested change management approach, the **Organizational Change Management (OCM) methodology**. Touchpoints in each involved business unit or user group will be established and will certify involvement by and communication to all affected users.

The change management plan will focus on the following two main themes:

- Defining and communicating objectives and direction at the program level to set the agenda, inspire, and guide the individual sites and user groups.
- Agreeing on and implementing a set of site-specific activities to enable users to adopt new ways of working and realize real benefits while accepting the change.

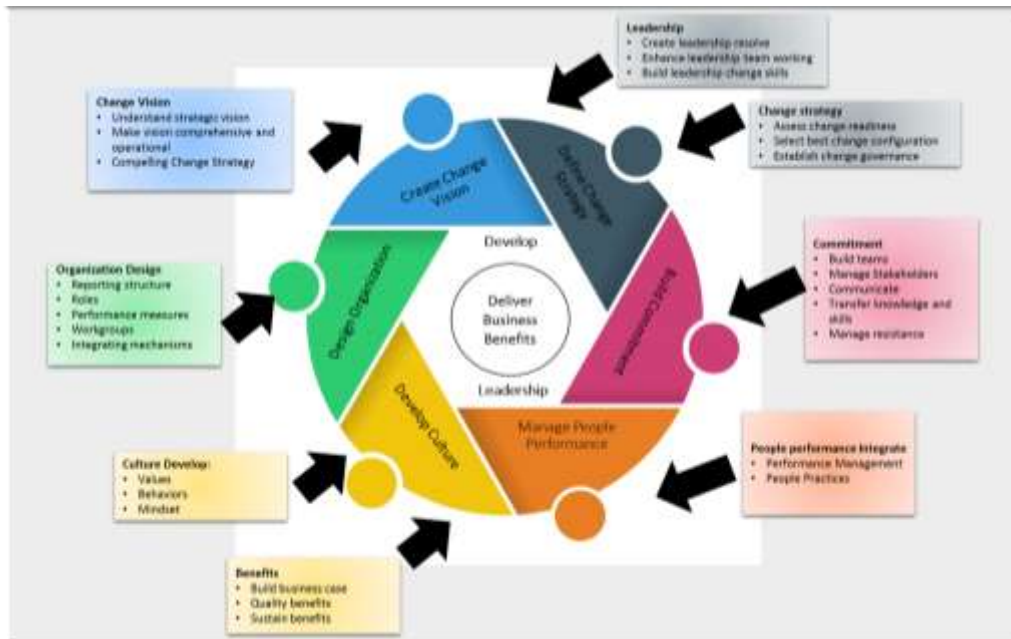
These two themes can be broken down further following the AgreeYa **OCM framework**. The framework explains the elements that will form the basis of a change management approach for the entire project.

	Program Level	Site Level
Vision for Change	<ul style="list-style-type: none"> • Define the compelling need for migration. 	<ul style="list-style-type: none"> • Translate this to relate with user-specific priorities and concerns.
Change Strategy	<ul style="list-style-type: none"> • Define the broad approach for making the change happen and acceptable compromises that can be made. 	<ul style="list-style-type: none"> • Develop a site change plan suitable for local readiness, skills, and issues.

	Program Level	Site Level
Leadership resolve	<ul style="list-style-type: none"> • Demonstrate resolve at the highest levels and generate corporate-wide consensus on the way forward. 	<ul style="list-style-type: none"> • Cascade corporate momentum to develop local leadership and resolve.
User commitment for change	<ul style="list-style-type: none"> • Develop and deliver program-level communication and commitment when building processes and integrating with multiple business units. • Develop program-level communication and marketing strategies for building commitment and usage rates for customers that meet their stated requirements. 	<ul style="list-style-type: none"> • Supplement program-level communication and commitment processes with lower-level detail for the local audience. • Staff and train the site-specific implementation team. • Gather and include customer site requirements and needs.
Organizational Factors	<ul style="list-style-type: none"> • Identify organizational levers to permute new ways of working (e.g. compensation policies, channel roles and reporting, and business unit structure) 	<ul style="list-style-type: none"> • Design and implement site-specific organizational changes to promote new ways of working.
Performance Management	<ul style="list-style-type: none"> • Set program level (corporate) targets and measures for individual performance and behavior. 	<ul style="list-style-type: none"> • Measure individual performance and identify issues.
Cultural Considerations	<ul style="list-style-type: none"> • Develop broad cultural guidelines encompassing business unit and organizational differences. 	<ul style="list-style-type: none"> • Assess cultural issues and modify the plan accordingly.
Benefits Realization (Metrics)	<ul style="list-style-type: none"> • Build and agree on the corporate business case, benefits realization strategy, and targets (short and long term) at the task level. 	<ul style="list-style-type: none"> • Integrate targets into the local business plan. • Measure benefits achievement and act accordingly.

Change Management Phases

The change management plan will consist of corresponding five phases namely Engage, Analyze, Prepare, Migrate and Support. The Change Management Pan will follow the OCM Framework.



The OCM framework is comprehensive and pragmatic in dealing with the human and organizational aspects critical to successful change including:

- Communicate the change and gain buy-in from all affected parties and business units utilizing a proven methodology and hierarchy.
- Build a vision for change that will help people find links to overall business strategy creating a compelling, inclusive, and exciting environment.
- Engage change agents to create a joint resolution for change with a leadership team and then cascade that leadership resolve throughout the organization.
- Build individuals' commitment to change through teambuilding, communications, stakeholder management, and skills development and by managing resistance effectively.
- Define and implement the right organizational structure including roles, performance measures, workgroups, and related processes.
- Align performance management and other key people practices with new business requirements.
- Define the culture needed to match business needs and develop corresponding values, behaviors, and mindsets throughout the entire organization.
- Identify the change strategy that offers an effective balance between the best and fastest benefits given to an organization's culture, people, and change history.
- Focus on quantified business benefits and deliver them cost-effectively and on time.

Project Management Practices

Project management practices can make or break an end product or solution. The AgreeYa Team brings a project management methodology and tools that incorporate our experience and knowledge gained from implementing and maintaining large-scale technology projects nationally. This methodology has been tailored to support Agile processes, is based on the

Project Management Body of Knowledge (PMBOK), and is guided by three guiding principles to inform how and why we manage projects in the manner we do:

- **On-time, on budget, and in scope:** The initially agreed-upon schedule, scope, and budget are our guardrails. We honor those parameters and will only deviate after a formal conversation or change process with the County. We adhere to the PMI PMBOK standards to deliver premier project management; sticking to the contracted plan is at the core of these standards.
- **Communication is key:** We practice consistent communication to not only keep everyone up to date on progress but to address defects and roadblocks as they happen. This is the simplest, most efficient way to deal with difficulties. The subsection “Project Reporting” provides additional details on how we prioritize communication and transparency.
- **Utilize technology-based tools:** We use state-of-the-art tools to maximize and enhance our management capabilities. Technology-based tools like Jira, as discussed in the “Technology-Enabled Agility” section us to communicate effectively, handle roadblocks as they happen, and sometimes see them before they happen.

Our approach incorporates the below PMI PMBOK knowledge areas to holistically manage the project scope. These practices define the process/steps that need to be followed when variances in achieving a project’s objectives are identified. Project variances like risks, issues, or change requests can be raised at any point in time and our guiding principles allow us to handle those moving parts as they arise. Project management processes for risks, issues, action items, project decisions, and change requests will be carefully planned and followed to maintain that the project stays on track and achieves its goals.

PMBOK Knowledge Areas	Description of Knowledge Areas
Integration Management	<ul style="list-style-type: none"> • Provides repeatable tasks, standard templates, and supporting tools that document the project’s existence and authority to apply organizational resources to project activities
Scope Management	<ul style="list-style-type: none"> • Ensures the project includes the work required to complete the project successfully
Time Management	<ul style="list-style-type: none"> • Includes processes needed to manage the timely completion of the project
Cost Management	<ul style="list-style-type: none"> • Provides planning, estimating, and budgeting activities so that the project can be completed within the approved budget
Quality Management	<ul style="list-style-type: none"> • Includes processes and activities that determine quality objectives and responsibilities so that the project will deliver quality
Human Resource Management	<ul style="list-style-type: none"> • Includes processes needed to organize, manage, and lead the project team
Communication Management	<ul style="list-style-type: none"> • Promotes timely planning, collection, creation, distribution, storage, and management of project information
Risk Management	<ul style="list-style-type: none"> • Provides processes, standard templates, and supporting tools for conducting risk management planning, identification, analysis, response planning, and controlling risks on a project

PMBOK Knowledge Areas	Description of Knowledge Areas
Stakeholder Management	<ul style="list-style-type: none"> Includes processes to identify the stakeholders that could impact or be impacted by the project; to analyze stakeholder expectations, and develop appropriate management strategies for effectively engaging stakeholders in project decisions and execution

PMBOK Knowledge Areas

Project Reporting and Communication Plan

Project status reporting and metrics will be used to identify potential issues and delinquencies, as well as provide the necessary inputs to determine what preventive and/or corrective actions are needed to address them. Our Project Management methodology has several assets to help generate and report impactful project status reports and metrics, including our recommended project management information system tool, Jira. We have successfully leveraged Jira in the past to act as the primary hub for project management activities, as well as a centralized document repository. Jira offers real-time access to dashboards and information so that County stakeholders can monitor project progress daily.

As part of reporting requirement for the project, we will provide various reports to allow for the management and oversight of awareness metrics. These metrics will include but will not be limited to project health reports, the level of user engagement, and on-going activities report, a completed task related report, all upcoming milestones and releases related reports, testing and defect status reports, risk identification, and mitigation plan, and issues-tracking and resolution reports. We will also help with creating any ad-hoc reports for the project.

The AgreeYa project management approach aims to provide reporting views from various altitudes, enabling the County to understand and track the project from the tactical to the strategic level. Combined with continuous and consistent communication among and between the AgreeYa Team and the County, this fosters transparency and accountability in managing project progress, issues, and timing.

Weekly Project Meeting

The AgreeYa Team will attend weekly project status meetings with the County Project Manager that follows a mutually agreed-upon agenda. The weekly project meeting is comprised of, but not limited to, the following:

- Review and approval of previous meeting minutes
- Work status, issues, and resolutions
- Quality Assurance status
- Accomplishments
- Outstanding action items and resolutions
- Any escalations requiring County decisions
- Planned activities for the next reporting period

The weekly project meeting is designed to highlight project status, accomplishments, and escalations or decisions requiring County input. These meetings will ensure alignment between AgreeYa and the County Project Manager in the overall direction, progress, and timing of the project.

Project Status Reporting

The AgreeYa Team will provide regular written status reports, with the frequency determined during the project kickoff, to the County Project Manager detailing the project status and future activities. The status report will include the following information:

- Summary of the work completed during the reporting period
- Summary of the work planned for the next reporting period
- Status of the overall project, and all phases/tasks, including discussion regarding problems encountered, solutions, and proposed solutions
- List and description of issues encountered during the reporting period

The status report serves to document and quantify progress throughout the project, creating a foundation to make more informed decisions. Status reporting ensures a consistent flow of information and is an additional mechanism to align the project team and the County staff.

Schedule Control

- All the tasks shall be posted as action items on Jira/Azure DevOps.
- This would keep track of all the tasks and will get the status of the task during the project period.
- Alerts would be generated on missing the deadline.

Managing Project during Covid19 – Adjusting with the New Normal

Considering the current situation, we understand that a lot of the project work will have to be performed remotely. We have been delivering multiple projects remotely for many of our clients. We have a well-defined process in place including the required tools & infrastructure to handle remote engagement seamlessly. We have heavily invested in acquiring licenses for tools that make our staff's life easy while working remotely; alongside, we have also trained all our staff on those tools and processes. In short, we will make sure that even without onsite presence, our resources are equally efficient/time-bound and our timeline commitment is duly met. We will also analyze the situation as the project progresses and see what adjustments are needed for being remote versus onsite depending on the different phases of the project.

AgreeYa's Client Relationship Governance model

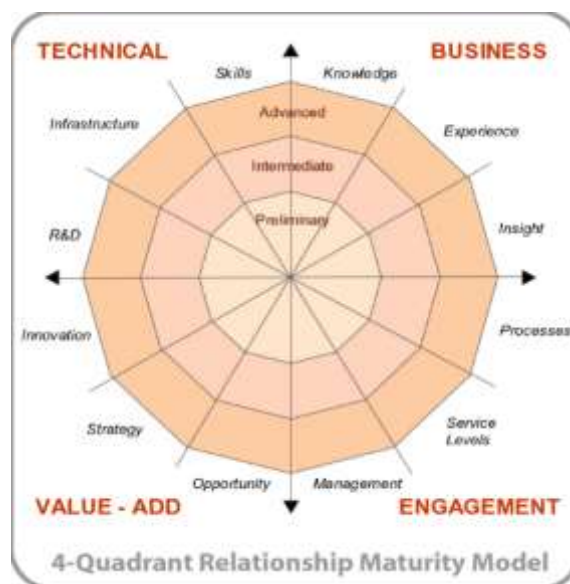
AgreeYa has a robust yet realistic client relationship governance process in place that's been in practice for many years now. This model is a collection of roles and responsibilities of client and AgreeYa Team members about the scope of the engagement and as defined in the service agreement.

This governance operating model is the mechanism used by AgreeYa to translate the elements of the governance framework and policies into practices, procedures, and job responsibilities within the corporate governance infrastructure. The following illustration shows the key areas of **AgreeYa's Client Relationship Governance model**. Each of the nine focus areas of the client governance model is briefly defined below:



AgreeYa's Client Relationship Governance model

To back this client governance model, AgreeYa has also developed a Relationship Measurement Model (RMM) to measure the maturity of relationships around business, technical, engagement, and value add parameters as depicted in the illustration below.



Relationship Measurement Model

Methods for Budget and Schedule Management

AgreeYa's budget and schedule management procedure ensure that the project is completed within the estimated budget/timeline or the parameters of the approved changes. Having accurate project estimates and a robust timeline necessary to deliver within the project budget. That is why AgreeYa follows a robust budget and schedule control methodology to keep track of budget and project cost.

Both estimating Costs and determining Timeline are project planning processes. There are several techniques that we follow to monitor and control the cost of a project, each of which is discussed below:

- **Earned Value Management:** Earned Value Management (EVM) is a mathematical method by which we measure the actual performance of a project. We use EVM to monitor all our projects in terms of schedule and cost.
- **Forecasting:** EVM provides formulae to forecast the future performance of a project. The forecast is based on the current actual performance. Our project managers follow some matrices to judge whether the projects will be delivered on time and within budget!
- **To-Complete Performance Index (TCPI):** For already delayed or over-budgeted projects, we use TCPI to determine the project performance required to complete the project as budgeted or estimated.
- **Performance Reviews:** Performance reviews in projects are done to check the health of a project. This usually involves Cost and Schedule as the main parameters for assessment. However, other parameters, such as Scope, Quality, and Team Morale are also used.

Roles and Responsibilities

Clearly defined Roles & Responsibilities describing County's engagement and time commitment

The Roles and Responsibilities of County Project Stakeholders in this project are provided below:

- Identify and enlist the core planning team
- Participate in Discovery Workshop and all assessment meetings
- Support AgreeYa in facilitating the participation of the stakeholders in project meetings
- Work with AgreeYa's Project Manager to resolve issues related to project schedule, if any
- Review deliverables as needed during the project
- Make decisions as and when required throughout the project duration
- Provide a single set of consolidated comments on deliverables
- Provide access to the Microsoft 365 Tenant for carrying out the project required activities
- Provide the FastTrack team with access and permissions to necessary infrastructure
- Respond to AgreeYa's request for clarifications and/or information promptly
- Participate in meetings as requested

AgreeYa's Proposal for Microsoft 365 Migration Services

- Provide all relevant branding elements
- Identify, schedule, and confirm availability of support staff and management for interviews and meetings
- Provide cooperative access to knowledgeable staff that may be required during the discovery and migration phase of the project
- Obtain and provide information, data, decisions, and approvals
- County will designate a project manager from among its personnel who will be dedicated to this project
- Test the Microsoft 365 rollout based on UAT
- Log documented test result errors into a spread-sheet
- Identify "bugs" so that AgreeYa and County can track for closure

We expect the participation of the below stakeholders from the County

Role	Time Commitment
Project Manager	25%
System Analyst(s) / Product Owner(s)	20%
Network System Administrator	30%
Department Stakeholders	15%

Discovery Methodology

Discovery methodology and task timeline

As understood from the RFP document, the scope of the project is to transition from the County's Google Workspace to Microsoft Office 365 for email, calendar, document management, and collaboration needs. This includes transitions from Gmail and Google Calendar to Microsoft Outlook and MS Exchange Online, Google Drive to OneDrive, implement Teams, SharePoint, Forms.

Below we have **provided our Unique Value Proposition, Project Execution Approach, and Proposed Project Plan** to cater to all those areas.

Unique Value Proposition

In this sub-section, we have identified a few key factors that we feel are the most important for County's Project success:



Leveraging Microsoft Partnership status

Being a Microsoft Gold partner, FastTrack Partner, AgreeYa can collaborate with Microsoft Engineers and leverage Microsoft tools and template that are only accessible to selected list of partners

We can also leverage Software Assurance vouchers to cover the assessment and planning part of the project



Quality Management

AgreeYa is a SEI CMMI and ISO 9001:2015 certified organization

We use our robust, proprietary methodology called SUMMIT to develop and monitor performance quality standards. SUMMIT incorporates best practices from PMBOK, ITIL/ITSM, eSCM-SP, Six Sigma, Agile, SCRUM, and RUP frameworks.



The RIGHT Project Manager

Dedicated Project Manager with 20+ years of experience in leading **similar large scale public sector Microsoft 365** project to lead this engagement. His presence will ensure unified communication and governance, quick issue resolution as well as on-time delivery



Proper Assessment is the Key to Success

Assessment is the major aspect of Exchange, MS Teams, OneDrive, Project Online Migration; Proper and planned assessment leads to seamless implementation, Governance and user adoption.



Extensive Experience in Microsoft 365

Relevant Microsoft competencies include:

- Microsoft Gold Certified Partner
- Microsoft FastTrack Program Partner
- Microsoft Cloud Solution Provider
- Microsoft Technology Adoption Program (TAP)
- Microsoft Azure Everywhere Partner
- Microsoft SharePoint Deployment Planning Services (SDPS)
- Microsoft O365 Beta Partner
- Microsoft Azure Government Partner



Pilot – Vet - Migrate

Migrate a small proportion of real user mailboxes, User data and Corporate file share data to EXO, MS Teams, and One Drive respectively; It is good to take a standing brief for a couple of Days to see if any issues arise. If so, you can mitigate any issues on a small number of mailboxes for future migrations, instead of trying to rein in the issues across a much larger number of entities.



Tools and Techniques for More Agility

Right tools, techniques, templates plays key role to accelerate project implementation; Proven tools mean achieving success in shorter duration!



Special focus on User Adoption and Training

Training for Power User and Business Users will benefit with demystifying the Microsoft365 workloads and help in user adoption.



Governance Plan Matters the Most

Without governance, enterprise model is like a body without soul. Governance plan is an important aspect which goes hand in hand for implantation and user adoption.



Public Sector Experience

AgreeYa has worked with agencies across more than 20 States – More than 80+ Public Sector Clients



State of California Experience

Worked with more than 50+ public sector agencies in State of California



Agile Methodology

Combined 20+ years of experience in Practicing Agile Methodology

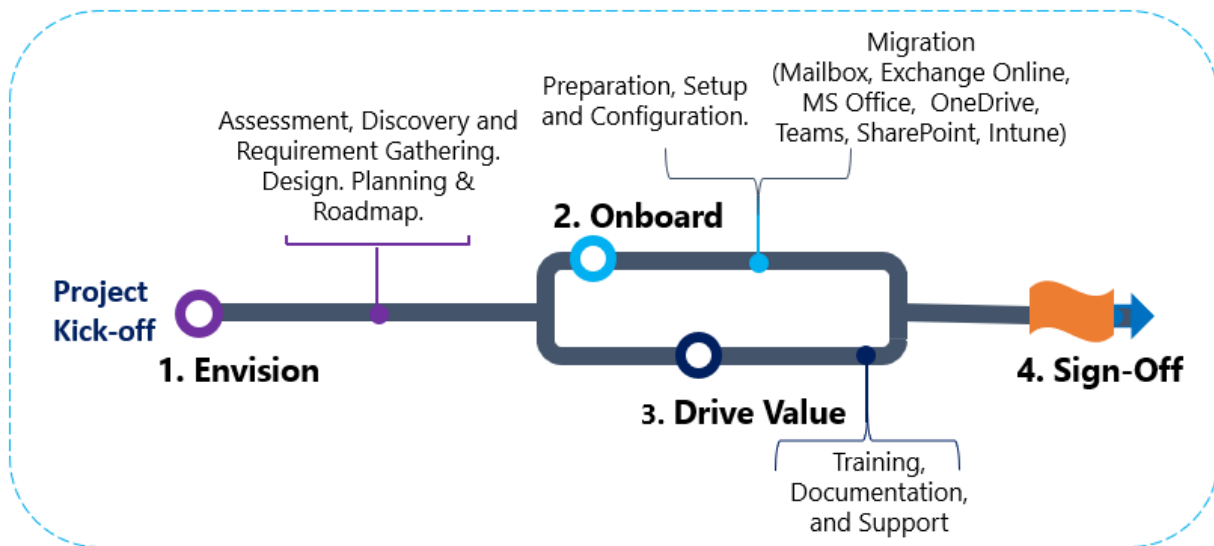
Project Execution Approach

To successfully transition to the latest applications, features, and functions of Microsoft 365, organizations must plan ahead. At AgreeYa, our team has gained a great deal of insight from deploying the entire Microsoft 365 suite to our global workforce as well a multiple public sector customers. Thoughtful and proactive communications, an upgrade deployment executed with expertise and speed, and training and support were key to the employees being productive from day one.

Below, we are sharing the framework, and tools we have used to implement Microsoft 365 workloads for various projects. This framework is modeled around the FastTrack methodology for implementing Microsoft Cloud workloads. We have a repository of templates, best practices, lessons learned, and training assets to help the County to get its employees up to speed quickly.

Using the FastTrack service will help the County in onboarding the Microsoft Cloud solutions and drive user adoption and our project execution approach is based on FastTrack.

Below, we have depicted our proposed project execution approach **which follows the FastTrack** delivery process.



The project will start with an internal Kick-off Meeting for the AgreeYa Team's and the County Team's introductions. Subsequently, we will review the project goals, roles, responsibilities, and high-level project plan. During the initial meetings, we gain a basic understanding of the business and operational environment, workforce dynamics. This initial effort will improve and accelerate the planning and proposed execution of the project engagement, thereby helping to ensure that outputs and outcomes meet and exceed expectations. Subsequently, we will enter the Envision sub-phase. As part of the Kick-off, AgreeYa Team will perform:

- Project Kick-Off Meeting
- Project team onboarding
- Identify County project stakeholders
- AgreeYa's internal kickoff
- Pre-project questionnaire analysis and project assets review
- Coordinate initial meetings, and other pre-project planning activities

As per industry best practices, we have bifurcated this project into the following sub-phase and tasks:

- **Envision**
 - ✓ Assessment, Discovery, and Requirement Gathering
 - ✓ Design, Planning, and Roadmap
- **Onboard**
 - ✓ Preparation, Setup, and Configuration
 - ✓ Implementation and Migration

- **Drive Value**
 - ✓ Training, Documentation, and Support
- **Sign-Off**

FastTrack follows a proven process to guide customers through deployment:

During the **Envision** sub-phase, we will assess the County's existing environment and evaluate its readiness for Microsoft 365 deployment. Alongside this, we'll create plans for user adoption and communication. Through FastTrack, the resources, tools, and best practices will be used to help the County plan for a successful deployment. The County will start by creating a Success Plan tailored to their business that includes both technical implementation and user adoption strategies across Microsoft 365.

Thereafter, in the **Onboard** sub-phase, we will configure the Microsoft 365 tenant (for all the relevant Microsoft 365 workloads in scope from Google Workspace). Once ready, the County will be provided with onboarding to get remote and personalized assistance from our FastTrack specialists, who will help the County to assess the technical environment and work with the IT staff to help ensure a smooth onboarding and migration experience.

Afterward, we will configure the core capabilities of the required Microsoft 365 workloads and progress to the **rollout** where we will at first rollout to a specific group of County users, and then do an Organization-wide rollout after testing for the specific set of users. Any early bugs/defects identified by the County users will be fixed by the AgreeYa Team during this period.

Thereafter, we will progress to the **Drive Value** sub-phase where we will help the County get the most value out of their IT investments. **FastTrack** process will provide the County with best practices, guidance, and resources to help gain user adoption. In addition, County will benefit from tools and guidance that will help them transform their existing IT practices and effectively manage change.

Parallel to the Onboard sub-phase, we will also have another sub-phase for Training, Documentation, and Support. We will be providing training to the County IT Admins on basic administration and best practices. We will also provide training via the "Train the Trainer" model to beginners and experienced users. Further, Level 1 (L1)/Level 2 (L2)/Level 3 (L3) support will be provided to the County along with chat-based support through AgreeYa Chatbot that will be implemented in the Teams Tenant.

We are confident that through this approach, AgreeYa Team will be able to successfully achieve the targets for the project.

Below we have outlined the key phases/milestones, tasks, and deliverables needed to complete the Discovery Track that includes assessment & planning, tenant provisioning, SharePoint,

Teams, OneDrive Rollout & Governance Implementation. The following requirement will be the primary areas of focus for the Discovery. Though the final set of requirements will be finalized after the initial discovery in collaboration with the County team and some of the phase/milestones and the task will overlap with one another and run in parallel. Timelines for each phase/milestone are provided under the **Project Schedule** section in the proposal.

“Experience Project Success with Our Unique Delivery Approach, Custom-Tailored for the County”

Phase 1

Task 1: Assessment, Discovery, and Requirements

What we'll perform as part of this task!

During this task, AgreeYa Team will assess County's existing communication environment and evaluate its readiness for deployments. We will also create plans for successful Pilot and Organization-wide full rollout. Alongside this, we'll create plans for user adoption and communication. During this task, the AgreeYa Team will also define the Migration strategy and plan which will be executed for pilot migration and full migration. The following key activities will constitute this task:

Assessment, Discovery, and Requirements

- Work with the County project stakeholders to understand intent, organizational goals, and usage plans for the service(s).
- Conduct kick-off meetings; clarify roles and responsibilities.
- Guide on Success Plan creation: Scope (including services to onboard and data to migrate), timelines, and contacts.
- Provide guidance needed for project governance. Participate in checkpoints.
- Guide the County on adoption best practices and the best way to drive usage.
- Align resources for online meetings and conduct Discovery Workshop.
- Run tools to gather environment data and estimate bandwidth requirements.
- Assess results and create remediation checklist, plan, timeline, and checkpoints.
- Build schedule for onboarding and migration (if applicable).
- Assessment of Current Landscape
- Check Bandwidth Availability: Network Assessment
- Review and Plan Bandwidth Design
- Assess Azure Active Directory Health and Identity Landscape
- Assess current Microsoft 365 tenant
- Assess Google Workspace messaging Environment
- Assess Google Vault Environment and configuration
- Assess Compliance and Governance policy in Use
- Review Data Privacy Requirements
- Assess Firewall Architecture

- Assess Current Mail flow and messaging environment
- Assess Office suite in use and devices.
- Assess Personal Archive for users
- Assess current Disaster Recovery and Business Continuity Mechanism
- Assess current Unified messaging platform
- Assess current data governance and User Data

Recommendation

- Share Consolidated recommendations as per best practices for all items Under "Assessment and Discovery"
- Recommendation for clean-up for on-premise Identity landscape, Messaging Landscape.
- Incorporate findings from the Discover phase to Envision to achieve proper migration, Implementation, Governance for the Messaging environment, and Data migration.

Plan

- Draft a report containing:
 - As-Is state overview
 - High-level Plan & Roadmap for migration of mailboxes, email archive, user and corporate data, Compliance, and Governance over to Microsoft 365.
 - Share consolidated recommendations as per best practices which include validating the architecture with FastTrack specialist for all items Under "Assessment and Discovery".
 - We will validate with the Microsoft FastTrack specialist the architecture and plan that we will finalize with the County.
 - Develop "to-be Identity landscape" incorporating planning architecture for on-premise Active Directory, Azure AD Connect, Microsoft 365 tenant readiness, and Network and DNS.

Our Approach for key sub-tasks / activities

Below, we have explained our approach for executing a few of the *key activities* from Project Task:

Assessment of Current Landscape

- Check migration throttling
- Check the maximum attachment sizes.
- Check the default and maximum retention period for deleted items in Exchange.
- Check the for-data corruption and supported file types.
- Check Blocked file types
- Check unsupported characters in file names.

Assess Bandwidth Availability: Network Assessment

- Check that the organization has sufficient bandwidth available for the migration.

- Explore alternatives for moving current and historical data to Microsoft 365 without using an Internet connection. For example, Microsoft offers the option of delivering data on hard disks directly to Microsoft for upload into the customer's account at a Microsoft data center.
- Check the current tenant throttling Limit.
- Check current DNS landscape and records.
- We will be using tools like Netmon, Microsoft remote connectivity analyzer, Microsoft Network Analyzer, Fiddler Tool to perform this activity.

Review Bandwidth Design

- Low bandwidth connections can cause problems in migrating to Microsoft 365, due to the long time it takes to move data across the network links; Hence, understanding what is in place currently across the organization and determining whether a higher bandwidth connection is required during and after the migration for such remote offices is very important
- Mitigate the risk of Low bandwidth with an appropriate solution like implanting Azure Express routes
- Assess Redundant Network Links

Assess and review Azure Active Directory Health and Identity Landscape

- Check the current health of the Azure Active Directory setup and resolve any issues
- Check the presence of multiple forests in the Azure Active Directory (AAD). While multiple forests can be synced with Azure AD, it is a complex process
- Clean OU (organization unit) structure so you can sync only specific OUs. However, multiple forest sync is supported with AAD implementation
- Exclude the admin and service accounts for on-premises servers from the OU structure that is synced to Azure AD
- Clean up and filter the objects to be synced to OU structure
- Establish a process for provisioning and de-provisioning users in Active Directory, to add new employees, update employees when changing jobs, and removing employees who are departing the organization

Assess current Microsoft 365 Tenant

- Perform As-Is assessment of features, governance, and compliance needs on Microsoft 365 environment in future
- The assessment will also include a cursory look at the practices, procedures, and controls used to manage the Microsoft 365 environment.

Assess Google Workspace Messaging Environment

- Assess Gmail mailboxes and Google Drive including attachments, calendars, contacts, folders, tasks
- Assess File/Folder hierarchy and permission
- Assess File/Folder naming conventions e.g. unsupported characters, the long path name

- Assess Mailbox and Google Drive data properties e.g. Mailbox size, highest mailbox size, etc.
- Assess Admin rights currently available

Assess Google Vault Environment and Configuration

- Assess Google Vaults including attachments, calendars, contacts, folders, tasks
- Assess Mailbox properties e.g. Mailbox size
- Assess Admin rights currently available
- Assess the currently applied retention hold and Policies

Review and Understand Compliance and Governance Requirements

- Review current compliance requirements.
- Map current compliance needs to Microsoft 365.
- Assessment of current email archives.
- Assess the Existence of encrypted customer or sensitive data (AD RMS). Plan to move accordingly.
- Organizations without compliance requirements can move faster and more simply to Microsoft 365. Those with compliance mandates need a rock-solid approach to ensure their organization isn't opened to legal risks and financial fallout.

Review Data Privacy Requirements

- Check the data privacy requirements for data that would be stored in Microsoft 365.
- Evaluate how Microsoft 365 handles data that would be subject to privacy requirements (such as social security numbers and credit card numbers), and if the automatic encryption capabilities in Microsoft 365 will be sufficient for County's requirements.
- Ensure Data meets GDPR

Assess and Understand Firewall Architecture

- Check current Firewall architecture
- Established Firewall rules to Microsoft 365 as needed

Assess current Mail flow and messaging environment

- Check the health of the current Gmail infrastructure
- Review Existing Mail flow scenario
- Check for Gmail and Microsoft 365 EWS Throttling
- Check other sub-performant aspects
- Check current hardware/ Compute is up to the migration challenge. As per MS best practice, physical hardware servers are recommended however VM is also not a big challenge.
- Use Microsoft's Office 365 Readiness tool to analyze current infrastructure using the latest guidance and premigration requirements from Microsoft, creating a customized plan for the organization.

Assess Office Suite in use and Devices

- Assess the MS Office Suite used by end-users
- Assess the variety of client OS used

Assess Personal Archive for users

- Review current archive and deletion policy
- Review already created retention tags for the archive and deletion policies
- Review existing custom deletion default policy tag
- Review existing custom retention policy tag for the Deleted Items folder
- Create a new retention policy
- Assign the new retention policy to user mailboxes

Assess current Disaster Recovery and Business Continuity Mechanism

- Identify the business functions in the County and the services and processes that support them.
- Revisit and update the disaster recovery and business continuity plans to account for the business process that depends on Microsoft 365 Cloud services
- Microsoft 365 Cloud services, like Exchange Online, MS Teams, SharePoint Online, and OneDrive for Business are designed and operated to be highly resilient.

Assess current data governance and User Data

- Perform As-Is assessment to create an inventory of the content that needs to be migrated to OneDrive including Metadata, etc.
- Review file share permissions and Metadata
- The assessment will also include a cursory look at the practices, procedures, and controls used to manage the existing content

Deliverables:

Based on the requirement understanding, AgreeYa Team will prepare the following deliverables:

- Readiness Assessment from Discovery
- Deployment and Implementation Plans
- User Adoption Plan
- Governance Plan
- Communications Plan
- Test Plan
- Training Plan

Task 2 - Design, Planning, and Roadmap (Microsoft FastTrack)

What we'll perform as part of this task!

During this task, AgreeYa Team will prepare the assessment report, share best practices recommendations, create the architecture of the Microsoft 365 tenant. We will also prepare the plan for Microsoft 365 Apps, Microsoft Intune, Microsoft Teams, OneDrive for Business, and

backup and recovery recommendations based on the Microsoft FastTrack recommendation and best practices. We will get the plan, design, and reports to be validated and fine-tuned from Microsoft FastTrack SME. The following key activities will constitute this task:

- Create an assessment report based on findings from As-Is Task
- Share Consolidated recommendations as per best practices for all items Under "Assess and Discovery"
- Recommendation for clean-up for on-premise Identity landscape, Messaging Landscape, User data, and corporate data landscape (if required)
- Incorporate findings from the Discover phase to Envision to achieve proper migration, Implementation, Governance for Messaging environment
- Develop to be Identity landscape incorporating planning architecture Azure AD Connect, Microsoft 365 tenant readiness, and Network and DNS
- Develop a Plan for compliance, governance Implementation
- Develop a plan for data migration
- Develop a plan for Microsoft 365 Apps deployment
- Develop a plan for Microsoft Intune MDM deployment
- Develop a plan for OneDrive for Business configuration
- Develop a plan for SharePoint Online configuration and Governance recommendations
- Develop a plan for Teams configuration and Governance recommendations
- Develop a Backup and Recovery Plan
- Develop a Disaster Recovery/Business Continuity Plan
- Develop knowledge transfer plan for IT administrators
- Develop knowledge transfer plan for Business users
- Provide an Information Architecture (IA) Design and Governance model

Deliverables:

Based on the requirement understanding, AgreeYa Team will prepare the following deliverables:

- Design and Architecture of the Microsoft 365 tenant
- Plan for Exchange Online, Microsoft Teams, OneDrive for Business, SharePoint Online, and Microsoft Intune recommendations based on the Microsoft best practices
- Plan for Teams configuration and Governance, Backup and Recovery Plan, Disaster Recovery/Business Continuity Plan

Phase 2

Task 1 – Microsoft 365 Identity & Access Management, SSO, and MFA

What we'll perform as part of this task!

In Microsoft 365, a well-planned and executed identity infrastructure paves the way for stronger security, including restricting access to the productivity workloads and their data to only authenticated users and devices. In this task, the AgreeYa team will Implement Microsoft 365

Identity models, authentication, and access procedures. Further, this task will include the following activities:

- Configure Office 365 Tenant
- License and Subscription management
- Updating vanity domains
- Configure DNS settings for tenant
- Configure ADFS Service
- Configure Azure SSO
- Configure Azure Conditional Access
- Configure Microsoft MFA

Deliverables:

Based on the requirement understanding, AgreeYa Team will prepare the following deliverables:

- Identity & Access configured
- ADFS and SSO implemented

Task 2 – Microsoft 365 Mailbox Provisioning

What we'll perform as part of this task!

After completion of task 1, we will prepare Exchange Online for creating user mailboxes in Exchange Online. 1843 mailboxes with 14TB of storage, average mailbox size 3 GB up to 35 GB. We will use Exchange Online PowerShell to create a new mailbox. The following key activities will constitute this task

- License Assignment and Mailbox provisioning in Exchange Online
- Prepare user mailboxes for migration

Deliverables:

Based on the requirement understanding, AgreeYa Team will prepare the following deliverables:

- Licenses Assigned
- Mailboxes provisioned
- Mailboxes prepared for Data Migration

Phase 3

Task 1 – SharePoint Online Implementation and Governance Recommendations

Based on our experiences working with multiple clients on implementing similar platforms, we've identified a methodology that we feel drives the end-user adoption for any Microsoft 365 platform. Our methodology is based on four pillars; They are -



To help identify business scenarios, we utilize the framework below



What we'll perform as part of this task!

During this task, the AgreeYa Team will work towards a review of the as-is state of the County's existing SharePoint environment and public folders. AgreeYa Team will work with the County team to understand the current state of business and help build a plan for pilot and full rollout for Intranet. During this task, the AgreeYa Team will also define the Migration strategy and plan which will be executed for pilot migration and full migration. The following key activities will constitute this task:

- Configure SharePoint Admin Center
- Provision SharePoint for users
- SharePoint Governance & Recommendations
-

Deliverables:

Based on the requirement understanding, AgreeYa Team will prepare the following deliverables:

- Readiness/Environment Assessment from Discovery
- SharePoint Deployment and Implementation Plans
- User Adoption Plan
- Governance Plan

- Communications Plan
- Training Plan
- Test Plan
- Requirements Document

Task 2 – OneDrive for Business Implementation

For migration of OneDrive for Business, it's a best practice to migrate a small proportion of real User Data, and Corporate file share data to OneDrive from Google Drive, take a standing brief for a couple of days to see if any issues arise. In that way, any issues can be mitigated on a small number of users for future migrations, instead of trying to rein in the issues across a much larger number of entities.

What we'll perform as part of this task!

We will implement OneDrive for Business. The following key activities will constitute this task:

- Configure OneDrive for Business Admin Center
- Provision OneDrive for Business for users
- OneDrive Sync Client Provisioning

Deliverables:

Based on the requirement understanding, AgreeYa Team will prepare the following deliverables:

- OneDrive for Business Configured
- Implementation of OneDrive for Business on Microsoft 365

Task 3 – Microsoft Teams and Chatbot Implementation including Governance Recommendations

Once the business needs have been captured from the stakeholders and business – Its more important to implement strict controls on how teams are named and classified, whether guests can be added as team members and who can create teams. Governance plan will be very critical for County's Microsoft 365 deployment, because:

- It will help clarify what to prioritize for adoption and deployment.
- It will ensure to keep a tab on unacceptable levels of security risk.
- It will enable County to maximize its Return on Investment (ROI) while controlling its Total Cost of Ownership (TCO).

We have helped multiple customers implement a stringent Governance model and helped automated some of their Teams processes via Apps and Chatbots.

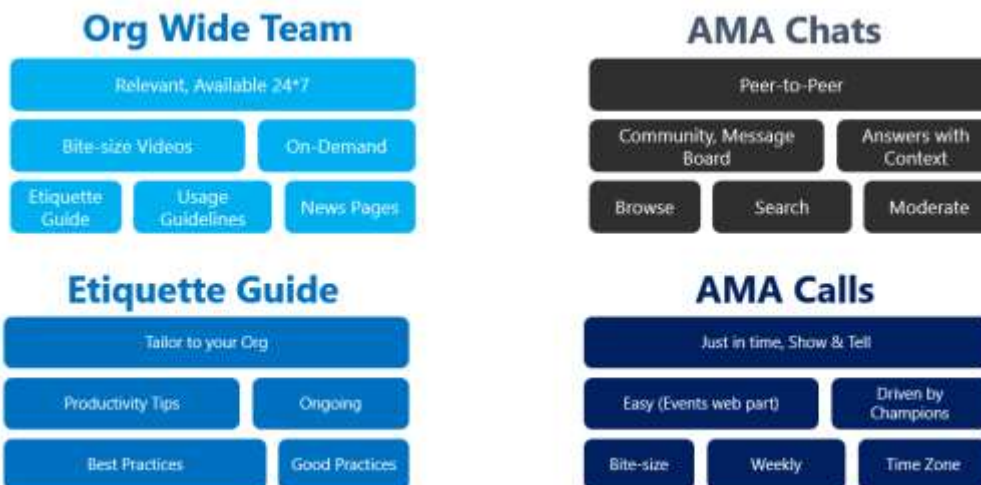
One of the most important factors for Teams success is ensuring that all users are using Teams. We believe Awareness and Training will play a very important role in the overall Adoption of MS Teams in the County. A newly implemented system's success is measured not only by how well the technology is implemented, rather by how well the system is accepted by the end-user.

Hence, County needs to put equal emphasis on implementation and awareness to get the value out of their investments.

AgreeYa has a defined methodology for ensuring Microsoft Team's user adoption. We put utmost stress on analyzing the Teams usage trends with the help of Microsoft 365 Adoption Reports. We create and analyze the usage dashboards and take measures to improvise the adoption regularly. We identify the training, communication needs for users to adopt the new Teams tool. Alongside, we have a defined process for creating the adoption plan (Including the Scenarios phase, Training, Champions Identification, Communication & Awareness, Resistance Management, Governance measures). For awareness and training, we have multiple innovative ways to train and engage users to adopt the newly implemented Teams Platform. Some of those are mentioned below:



For some of our customers (e.g. BDG, Bureau Veritas, City of Fontana etc.) we have implemented our AgreeYa Chatbot for Microsoft 365 & Teams to enhance the overall Teams User Adoption



Based on our extensive experience in implementing Teams, we have captured some of the important communication-related factors to make any Teams rollout a success. A sample communication plan, that can be very effective for making County's Teams rollout a success is provided below:

Tactic or Phase	Content Creation		Content Distribution	Adoption
	Week 1	Week 2	Week 3	Week 4
Newsletter				
Posters				
First Touch Event				
Brown Bag Sessions				
Early Adopter Video				
Auditorium Training				
Online / On-demand Training				
Lunch and Learn				
Tips and Tricks				
Awards or Incentives and Certifications				
Website				

What we'll perform as part of this task!

During this task, the AgreeYa Team will work towards a review of the as-is way of communication and collaboration within the County. The following key activities will constitute this task:

- Configure MS Teams Admin center
- Teams Governance & Recommendations (Naming Conventions, Templates, Policies, Creation Process, Archival Process, etc.)
- Teams Client Provisioning
- Configuring Tenant-wide team settings
- Configuring Guest access
- Configuring Naming policy
- Conduct a pilot of MS Teams Rollout and performing Internal testing.
- Assist County to get the User Acceptance Testing completed on the Pilot rollout
- Fix any issues/changes suggested as part of the UAT
- Roll out Teams across County

Deliverables:

Based on the requirement understanding, AgreeYa Team will prepare the following deliverables for TEAMS:

- Readiness/Environment Assessment from Discovery
- Deployment and Implementation Plans
- User Adoption Plan
- Governance Plan
- Communications Plan
- Training Plan
- Test Plan
- Requirements Document

Task 4 – Microsoft 365 Security & Governance implementation

What we'll perform as part of this task!

We understand that effective security policies must be implemented consistently to protect Microsoft's information systems. Security policies must also account for variations in business functions and information systems to be universally applicable. The following key activities will constitute this task

- Configure EOP (Exchange Online Protection)
- Enable Auditing for the tenant
- Disable external access
- Configure Azure Information Protection
- Configure Retention policies
- Configure Archiving policies
- Enable Advanced eDiscovery and Advanced Data Governance

- Implement Advanced Threat Protection

Deliverables:

Based on the requirement understanding, AgreeYa Team will prepare the following deliverables:

- Configured recommended eligible services settings
- Defined threat-protection policies to set the appropriate level of protection
- Guided on Success Plan creation

Identification and resolution of items out of scope in the Fast-Track program

Provide below are the items out of scope in the FastTrack program

Source Environment	What doesn't migrate
Migration to Exchange Online	
Google Suite environment (Gmail, Contacts, and Calendar only)	<ul style="list-style-type: none"> • Rules • Delegates • Signatures • Tasks • Any email or attachment that exceeds the message size limit • Blocked or inactive users • Archive data from PST files or any third-party archive solution (for example, Google Vault) • Rights managed or encrypted emails • Corrupted items • Google Hangouts** • Google Groups • Resource mailboxes • Inactive mailboxes • Vacation settings and automatic reply settings • Shared calendars, cloud attachments, Google Hangout links, and event colors • Photos • Forms • YouTube
Migration to OneDrive for Business	
Single G Suite environment (Google Drive only)	<ul style="list-style-type: none"> • Ownership history, previous versions, and comments • File and folder descriptions, folder colors • User-level file permissions • Group-level file permissions • Advanced metadata • File lock attributes • Conversion of embedded URLs in content • Trashed items • Inaccessible or corrupted documents • Blocked or inactive users • Google Photos, Forms, Maps, and other connected apps • Google Drawings • Shared content external to your organization

Source Environment	What doesn't migrate
	<ul style="list-style-type: none"> • Content not owned by the Google Drive account being migrated • Permissions and basic metadata of external users (Note: Use Google Drive Admin reports to identify content shared with external users. Instruct end-users to reshare content with external users after migration.) • Shared Drive membership permissions (Note: Use Google Drive Admin reports to identify shared drive memberships. Instruct end users to configure these membership settings on the target before migration.) • Files marked as restricted or not copyable • Files or folders exceeding current SharePoint Online restrictions and limitations • Photos • Forms • YouTube

Provided below are data objects, destination details, and recommended tools that will be used for the actual migration. Not all Google components can be migrated to Microsoft 365 tenant using the FastTrack program and some Google components will be migrated using 3rd party tools or manual processes.

S. No	Data Objects	Destination	Recommended Tools
1.	Gmail	Exchange Online	FastTrack
2.	Google Drive	OneDrive	FastTrack
3.	Google Sites	SharePoint and Teams	CloudM
4.	Google Forms	MS 365 Forms	Manual - Recreate
5.	Google Vault	Exchange Online	CloudM
6.	YouTube	Streams	Manual
7.	Photos	Teams / SharePoint	Manual
8.	Classroom	Teams	Manual
9.	Google Sheets	Teams / SharePoint	CloudM
10.	Google Docs	Teams / SharePoint	CloudM
11.	Google Contacts	Exchange Contacts	CloudM

Migration Methodology

Migration methodology and timeline

The Scope of Migration and related methodology for this project is provided below.

Migration and Implementation of Microsoft 365

FastTrack provides migration guidance and data migration services. We will prepare, provide guidance in collaboration with Microsoft to help the County plan the migration, configure the source environments and Microsoft 365 tenant, and leverage the data migration services to migrate the County data. The County will create and schedule the migration events in tandem with us. We will launch the migration events with Microsoft, in accordance with the schedule, monitor their progress, and provide status reports.

Since AgreeYa is a Microsoft FastTrack partner, we will leverage the Microsoft FastTrack services for the actual Data migration which will involve the following work.

- Migration of 1843 mailboxes with approx. 14 TB of the data size (Approx. 3 GB per mailbox average up to 35 GB) from Gmail to MS Exchange Online
- Restructure and migration of 2 TB of content from Google Drive to OneDrive for Business
- Migration of data content from Google Sites (15 – 20) to SharePoint Online
- Phase wise rollout
 - ✓ First migrate the Information Technology Department, followed by Law and Justice, Health and Human Services, Land Use/Environmental Management, and General Government.

Migration Methodology that will be used for this work

- Provide a migration workshop covering the approach and process for the selected migration scenario
- Provide requirements for the source environment and Microsoft 365 tenant access to provide data migration services
- Provide guidance on configuring the source environments and Microsoft 365 tenant to enable data migration
- Configure FastTrack migration services to conduct the migrations
- Provide guidance on migration event scheduling
- Conduct migration events following the schedule
- Provide status reports for active migration events
- Monitor migration events and remediate and resolve migration issues

- Provide remediation and resolution options for migration issues that require County action.
- Provide final reports for completed migration events.
- Daily Sync-up meeting with Microsoft Fast Track

Below we have outlined the key phases/milestones, tasks, and deliverables needed to complete the Migration Track. The following requirement will be the primary areas of focus for Migration. Though the final set of requirements will be finalized after the initial discovery in collaboration with the County team and some of the phases/milestones and the task will overlap with one another and run in parallel. Timelines for each phase/milestone are provided under the **Project Schedule** section in the proposal.

Phase 4

Task1 – Migration preparations (Source and Destination)

What will be performed as part of this task!

- Create Google Service Account
- Create migration endpoint
- Configure additional domain in Office 365
- Disable Google MFA for Admins
- Prepare Azure AD for migration
- Grant Google API permissions

Task 2 – Test Migration and Validation with Microsoft FastTrack (16TB Content)

What will be performed as part of this task!

- Create 10 test user mailboxes in Google Workspace
- Test migration for Google Drive
- Initiate test user mailbox migration to check the endpoint and other settings
- Validate test migration and data

Phase 5 and 6 (Pilot and Full Migration)

Task 1 – Data Migration Leveraging Microsoft FastTrack Services (Mailbox and OneDrive)

Methodology

1. Migrate a small portion of content and verify the results
2. Make any modifications based on pilot migration output

3. Do some quick testing of the plans and mapping created during the Planning and Assessment phase.

Through this process, we will also get an idea of what type of performance to expect throughout the migration and make the adjustments needed for optimal migration. In addition to the actual migration of content, the pilot migration tests permissions and access verifies success, captures and addresses any errors, documents result, and gathers migration statistics. It also provides an opportunity to optimize migration activities and will include rollback testing.

AgreeYa follows the "Pilot-Vet-Migrate" approach for all the Exchange Online Migration projects. It has given us fruitful results in the past, and we are confident that the same approach will ensure the success for County too.

What will be performed as part of this task!

- Initiate Google Mailbox migration to Microsoft Exchange Online using Microsoft FastTrack Services
- Initiate Google Drive migration to Microsoft OneDrive for Business using Microsoft FastTrack Services

Task 2 – Migration Validation and Remediation

What will be performed as part of this task!

- Validate the migration
- Remediate the migration issues (if any)

Task 3 - Google Vault to Microsoft 365 Archive and Google Sites and Google Drive to SharePoint online and Teams Migration

What will be performed as part of this task!

- Configuration of CloudM Migration Tool
- Configuration of Project at Google Admin Center
- Setup Impersonation Role to Admins
- Configure Azure Storage (Azure BLOB)
- Assignment of Tool Licenses
- Configuration of Source and Destination Endpoints
- Modification of Default Migration Parameters
- Test Migration
- Initiate Migration from Google Vault to Exchange Online

Task 4: User Acceptance & Testing (UAT)

What will be performed as part of this task!

AgreeYa Team would create test scenarios and provide issue resolution support based on UAT feedback and results. County will be responsible for user acceptance planning, test case development, and testing. We will assist County in conducting UAT with a group of identified users. We will also provide the remedy for any issues/defects identified, to ensure a successful migration.

Task5: Migration Sign Off and Cutover

- Cutover the batches upon successful migration
- Migration Sign Off

Phase 7

Task 1 – Microsoft 365 Client Apps and Recommendations

What we'll perform as part of this task!

As part of this, we will plan, prepare, and document Microsoft 365 Apps in their enterprise environments. The following key activities will constitute this task

- Prepare and Submit Documentation with Recommendations for App deployment
- Provide required assistance to County's IT Team

Deliverables:

Based on the requirement understanding, AgreeYa Team will prepare the following deliverables:

- Documentation for Microsoft 365 Apps

Task 2 - Device Upgrade & Migration to Windows 10 (1600 Devices)

What will be performed as part of this task!

- Provide a Golden Image for Windows 10 upgrade from different OS Platforms
- Setup Task Sequence on SCCM Console to Push Win10 Images on Client Machines
- Test and Validate the Task Sequence
- Roll Out of Task Sequence on Required Machines

Task 3 – Microsoft Intune MDM Implementation

What we'll perform as part of this task!

As part of this, we will plan, deploy, and manage the implementation of Intune for Mobile Device Management. The following key activities will constitute this task

- Configure Policy Settings for Mobile Devices

- Create Groups for policy assignment
- Device Auto-enrollment configuration
- Deploy MS Intune MDM
- Enroll devices to MS Intune MDM
- Deploy Mobile Application Management
- Integration JAMF with Microsoft Intune
- Configure Conditional Access for Intune
- Configure Co-Management for Intune (if required)

Deliverables:

Based on the requirement understanding, AgreeYa Team will prepare the following deliverables:

- Intune MDM Configured
- Enroll devices of each supported platform

Task 4 - User Acceptance & Testing (UAT)

What will be performed as part of this task!

The Device Upgrade milestone will start with 25% of the devices, followed by 50%, 75%, and remaining devices as per the milestones provided in the project schedule. Once the devices are upgraded, UAT will be done in collaboration with the County team for any issues and will be rectified.

Phase 8

Task 1 – Training, Documentation, and Knowledge Transfer

We will provide Training, do the Knowledge Transfer to the County system admins and general users. Alongside this, we will prepare and submit relevant SOPs wherever it is required.

What we'll perform as part of this task!

Training

Training to IT staff members, Training of System Admins, Training to Business Users:

- Provide Training for Technical and Sys Admins to Configure, Implement and Support
- Provide Training for Technical and Sys Admins to Trouble-Shoot & Assist in Support
- Provide Fundamentals training for Beginner End-Users
- Provide Intermediate Training for Experienced End-Users
- Advanced Training of Features & Functions for Advanced Experienced End-Users
- Administration of Microsoft 365 services
- Creation and administration of archive and retention policies

- Provisioning and de-provisioning of users, including disposition of data that meets County retention and compliance policies
- Responding to e-discovery and legal hold requests
- Managing DirSync
- Administering Microsoft System Center
- Microsoft 365 administration best practices, including role-based controls and separation of duties
- Creating reports for activity, performance, health, and access

Documentation

- General end-user training documentation on the new Microsoft 365 messaging environment, including OWA, OneDrive, etc.
- General end-user SOP documentation on changes necessary on mobile devices to use Active Sync in the new messaging environment

***Note- the above list of training and documentation is not inclusive of all the activities that will be done during this task. The complete list will be published based on further discussion with the County project team*

Deliverables:

Based on the requirement understanding, AgreeYa Team will prepare the following deliverables:

- Training Materials/Documentation

Phase 9

Task 1 - Support (L1, L2, L3)

What will be performed as part of this task!

- Provide 4 hrs. per day L1/L2/L3 support during the Upgradation, Implementation, and Migration activities starting Week 9 of the project
- Introduce **AgreeYa Chatbot** support for end-users & IT Admins
- Remediate issues reported by the County team

Task 2 - Sign Off

On completion of all the project tasks, in collaboration with the County project team, we will take the project sign-off from the County project stakeholders and review overall project reports, status, and milestone completion. It will mean a formal acceptance of the project results by the County.

In this, we anticipate an acceptance from the County that everything had been delivered according to the contract and other specification documents.

Project sign-off includes a procedure of project results verification and signing customer acceptance sheet where expected project deliverables are listed and should be signed-off one-by-one as they appear formally inspected and accepted.

Project sign-off means that:

- Project is accomplished in time;
- The County is satisfied with the result;
- Outcomes meet the project scope and quality;
- The project reaches its objectives and can be closed as appropriate;
- Project performers are no more responsible for further development without any new billing

Support

The County IT team will be provided access to key AgreeYa L1/L2/L3 support team member’s telephone numbers and email during the support, where they can be contacted for escalations. AgreeYa Team will review the support incidents that are submitted by the County IT team through Ticketing Tool. After accessing the severity/priority of the issues, AgreeYa Team will provide solutions and workaround options wherever applicable. The support scope is limited to the issue-resolution/upgrade around existing workloads of the implemented solution only.

Support Service Levels

Support Level	Support Scope
Level 1 (L1) (Responsibility - AgreeYa)	<ul style="list-style-type: none"> ✓ Phone calls, chat-based support through AgreeYa Chatbot, email questions, and electronically input trouble tickets from users seeking assistance. ✓ Responsible for first-hand troubleshooting of the reported issue. ✓ This includes searching for the solutions to common issues and access other helpful tips and advisory information available in our extensive knowledge base. ✓ Responsible to determine the customer’s issue by analyzing the symptoms and figuring out the underlying problem. ✓ Review Help Desk queue daily and resolve or escalate cases as appropriate. ✓ Prioritize requests from users and determine criticality. Resolve or escalate to appropriate staff. ✓ Responsible to contact and follow up with L2 support in case their services are required.
Level 2 (L2) (Responsibility - AgreeYa)	<ul style="list-style-type: none"> ✓ Responsible to look into the issues that require deeper functional/technical knowledge of the product and are escalated from L1 support.

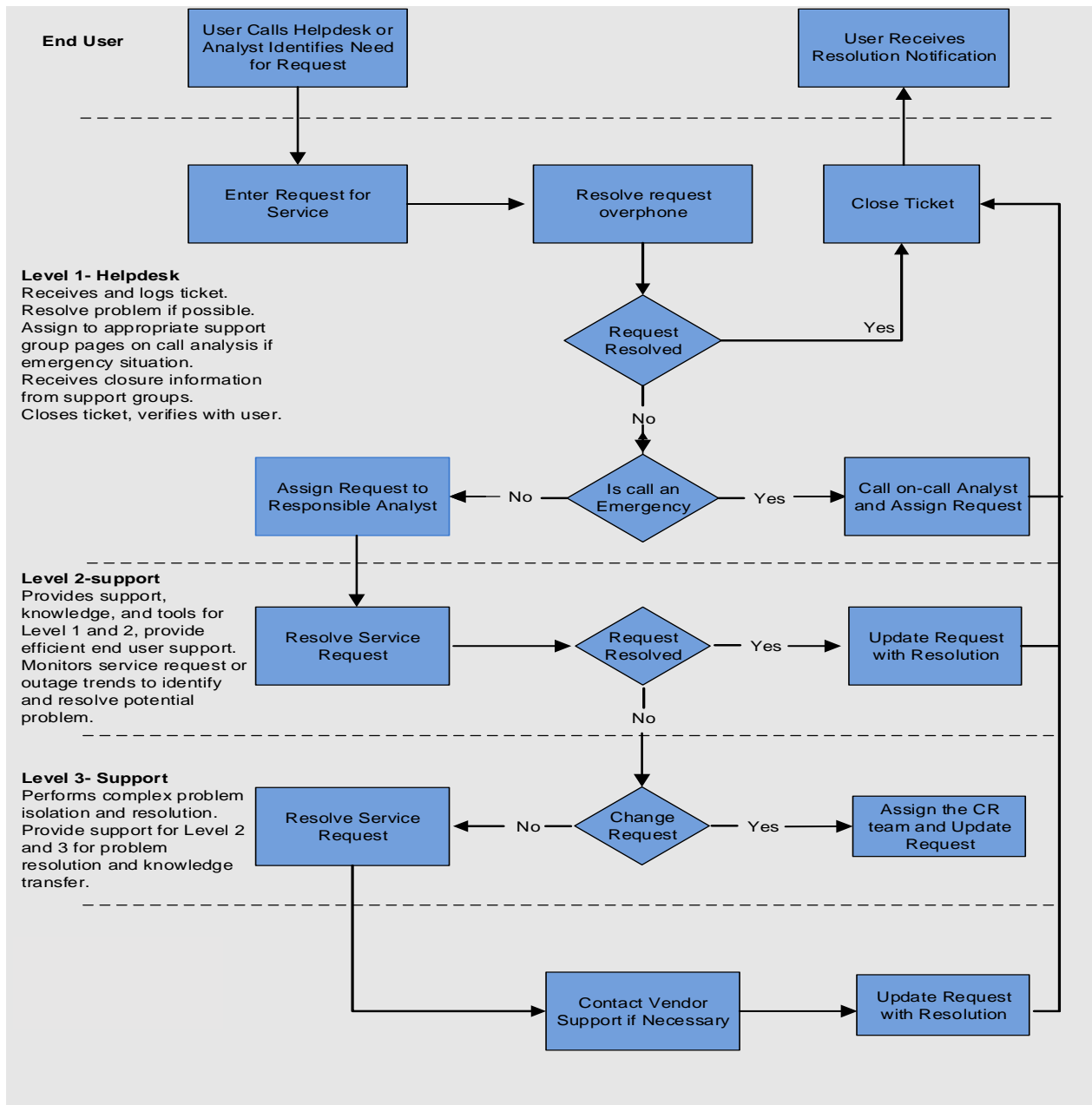
Support Level	Support Scope
	<ul style="list-style-type: none"> ✓ Responsible to suggest a workaround in case functionality is not working. ✓ Responsible to qualify the issue for L3 support in case L2 support is not able to rectify the issue and L3 services are required.
<p>Level 3 (L3) (Responsibility - AgreeYa)</p>	<ul style="list-style-type: none"> ✓ Responsible to look into any issue that is not resolved by L1/L2 and requires further scrutiny. ✓ Responsible to investigate the issue through logs for the issues that are not reproducible. ✓ Responsible for hotfix creation in case reported issue is reproducible and requires hotfix to resolve. ✓ The issue will be considered into L3 support only if the same is related to existing defined functionality. ✓ Liaison with Microsoft in case the issue is not resolved

Upon receipt of any identified problem/issue, we will work with the appropriate County contact to identify the root cause and will assign an appropriate severity level to set the priority of the support request.

AgreeYa Team will request the concerned to arrange and provide all the information requested for each error or submitted incident. Failing to provide sufficient detail regarding the incident, AgreeYa Team may not be obligated to provide the services associated with such error/problem.

Support Model

We have a comprehensive process in place to ensure proactive communication and subsequent issue management. The communication plan that will be followed by AgreeYa has been illustrated in the diagrams below:



Support Window: Below, we have provided the details of the support hours for this engagement:

#	Classification of the service	Hours of services	Resources Availability
1	Normal business hours support	8:30 AM – 5:30 PM PST Monday – Friday	Business Hours (PST)
2	Weekend/Holiday Support Services	Saturday & Sunday or Holidays	Limited supports services only for Severity 1 incidents

Note: Support hours can be modified based on further discussion with the County.

Severity Level Definition:

The following **severity level definitions** will follow for each of the respective support tickets and hence will define the SLA in terms of the response time for the proposed support services:

Severity Levels	Definition	Response Time
Severity 1 (S1)	<ul style="list-style-type: none"> ✓ Business operations have been severely disrupted ✓ Substantial loss of service ✓ All or a substantial portion of mission-critical data is at significant risk of loss or corruption. 	2 Hours
Severity 2 (S2)	<ul style="list-style-type: none"> ✓ Major functionality is severely impaired ✓ Operations can continue in a restricted fashion, although long-term productivity might be adversely affected ✓ A major milestone is at risk. ✓ A temporary workaround is available. 	8 Hours
Severity 3 (S3)	<ul style="list-style-type: none"> ✓ Partial, non-critical loss of functionality. ✓ Impaired operations of some components but allows the user to continue using the associated system & site. ✓ A minor milestone is at minimal risk. ✓ A temporary workaround is available. 	16 Hours

For S1 issues, AgreeYa Single Point of Contact (SPOC) would be available. We will share the contact details at the start of the engagement.

Support Login. The County shall have access to the AgreeYa support team dedicated email id meant for undertaking the support incidents shared by County.

Submission Details. The County must arrange and provide all information requested by AgreeYa for each error or a submitted Incident. Failing to provide sufficient detail regarding the Incident, AgreeYa may not be obligated to provide the Services associated with such Incident.

Project Assumptions and Exclusions

Assumptions

AgreeYa has considered the following assumptions while preparing this proposal based on information available in RFP and the response of the County to the questionnaires:

- County personnel and the County project manager will be available, per the agreed-upon project schedule for discussions, issue resolution, reviews/approvals, and providing feedback.
- AgreeYa would not be responsible for the delays that occur during the project caused by the County processes (i.e. delay in approval or decisions, unavailability of concerned persons, unavailability of prerequisites like hardware, software, internet connectivity issues found, Licenses, etc.). Any delay by more than 2 days will be dealt with as a change order.
- Any items identified during the project and not listed under the Scope will be recorded as a Change Order and will incur an additional cost.
- County will provide facilities and access (Information, Admin rights) to the AgreeYa Team as required for the project execution.
- All the users are already Provisioned in Azure AD.
- All the Microsoft 365 Licenses are available.
- There are no customizations in Google forms (50-100 forms).
- There is no Custom Apps in Google Workspace.
- There are no Custom components in Google Sites (15-20 Google Sites).
- We are assuming no integration of Gmail with YouTube Videos and YouTube videos have to be uploaded to Google Drive/SPO Site manually
- We are assuming Photos are stored on the User's Google Drive
- No Migration needs to be done from Google Drive to SharePoint and Teams
- County will be responsible for taking the latest backup of the complete Google Workspace, data, and content. Any guidelines/agreement to be provided and agreed by County and AgreeYa at the start of the project.
- We are assuming that the County environment and platforms for Office 365 are in a healthy and running state.
- All unresolved issues will be raised to the County's designated Project Manager and will be addressed in a timely manner to avoid any adverse impact on the project.
- County will provide a review of the deliverables within two (2) business days.
- County will be responsible to educate end-user to manage and upload local PST to outlook profiles mapped to Microsoft 365 however, AgreeYa will provide a documented approach to System admins of the County or Project SPOC to perform the same (if required).
- It is assumed that the County already has and will provide all required hardware/software and licenses, 3rd Party tools and access as needed to access and set up the Source (Google Workspace Super Admin credentials), Destination (Microsoft 365 Global

Admin credentials), Servers (Microsoft 365 Global Admin credentials, Enterprise Admins and Domain Admins credentials) for single sign-on with ADFS Federation or pass-through authentication and Azure Active Directory connect synchronization and other project deliverables as mentioned in the scope of work.

- County will perform all required activities on the infrastructure as a part of the preparation of migration activities like upgrading server builds and roll-ups, patching, provide required certificates, and mapping the same.
- It is assumed that County support staff will be available to support migrated mailbox users and handle end-user communication (IT support) per the project plan.
- County will share the list of users 5 days before mailbox and other Google Workspace content migration.
- It is assumed that AgreeYa will technically support only County System Admins in case any issues occur related to required project deliverables and not the end-users. Though, AgreeYa will provide training to approx. 50 County end users
- It is assumed from County response to Questionnaires, below are the data size for different components that AgreeYa considered to plan and design the Project approach:
 - Total Size of each Exchange Mailboxes – Between 3GB to 35GB.
 - Total Mailboxes to be migrated: 1800 Approximate
 - Approx. Size of all combined Database: 16TB
- Any network or server-related issues that need troubleshooting will be out of scope.
- The County team has an azure Blob Storage subscription for the tool to use to migrate Google Vault to Exchange Online
- We are assuming that County will provide the domain-joined server VMs for running role workloads (Azure AD connect/ADFS/Windows servers for domain controllers).
- The County SCCM team will be involved in preparing to push the required packages to end-user systems.

Exclusions:

From the County's response to questionnaires and RFP issued, the below components are excluded from the primary scope of services and any implementation/migration for the below components would be considered as a Change Order:

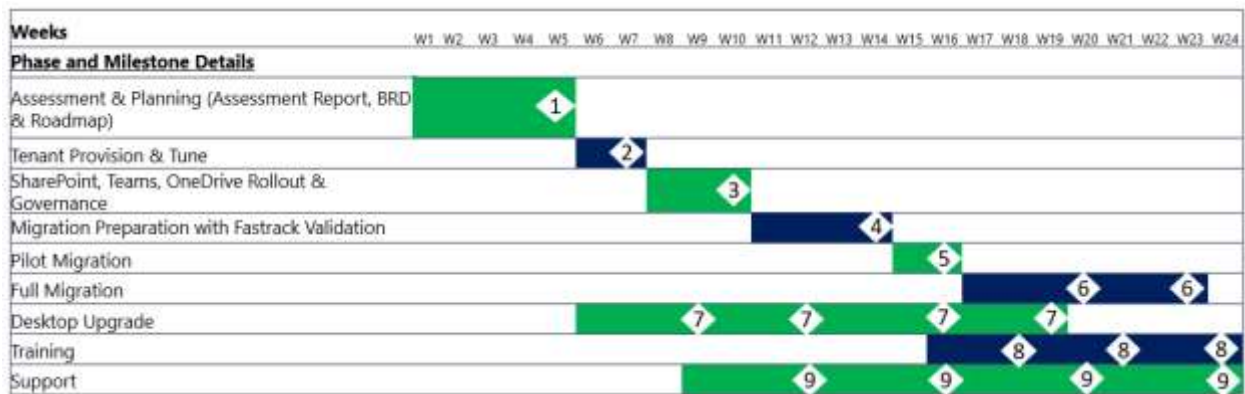
- The County does not intend to implement/roll out Migration of any content (except Google Site data) to SharePoint Online, and MS Teams from any source as a part of this project.
- Any sort of change/ upgrade or implementation on on-premise enterprise entities apart from required components as a pre-requisite for migration progress has been excluded as part of the scope of work.
- Any sort of software upgrade and installation / Operating system upgrade, office suite upgrade for end-user devices.
- Free/Busy and calendar sharing between Google Workspace and Microsoft 365 user mailboxes will be unavailable during Migration Phase

Project Schedule

Provided below is our proposed project schedule, including planned tasks, and activities. We are proposing a project timeline of **24 weeks**. This plan aligns with our project methodology for Discovery and Migration, as well as our approach to completing the project deliverables as provided under the Discovery and the Migration Methodology sections of the proposal response. Some of the phases, milestones, and tasks will run parallel to each other.

Phase	Activities/Tasks
Assessment & Planning	<ul style="list-style-type: none"> Project Kick-Off Assessment, Discovery, and Requirements Design, Planning, and Roadmap (Microsoft FastTrack)
Tenant Provision & Tune	<ul style="list-style-type: none"> Microsoft 365 Identity & Access Management, SSO, and MFA Microsoft 365 Mailboxes Provisioning
SharePoint, Teams, OneDrive Rollout & Governance Implementation	<ul style="list-style-type: none"> SharePoint Online Implementation and Governance Recommendations OneDrive for Business Implementation Microsoft Teams and Chatbot Implementation including Governance Recommendations Microsoft 365 Security & Governance implementation
Migration Prep & Fastrack Validation	<ul style="list-style-type: none"> Migration preparations (Source and Destination) Test Migration and Validation with MS FastTrack (16 TB Content)
Pilot Migration	<ul style="list-style-type: none"> Data Migration Leveraging Microsoft FastTrack Services (Mailbox, and OneDrive) - Contains Pilot Phase Google Vault to Microsoft 365 Archive and Google Sites and Google Drive to SharePoint online and Teams Migration – Contains Pilot Phase Migration Validation and Remediation
Full Migration	<ul style="list-style-type: none"> Data Migration Leveraging Microsoft FastTrack Services (Mailbox, and OneDrive) - Contains Velocity Migration Phase Google Vault to Microsoft 365 Archive and Google Sites and Google Drive to SharePoint online and Teams Migration

	<ul style="list-style-type: none"> • Migration Validation and Remediation • User Acceptance & Testing (UAT) • Migration Signoff and Cutover
Desktop Upgrade	<ul style="list-style-type: none"> • Microsoft 365 client Apps Recommendations • Device Upgrade & Migration to Windows 10 (1600 Devices) • Microsoft Intune Implementation
Training	<ul style="list-style-type: none"> • Training to IT staff members (2 hrs. each week for 3 Weeks) • Training to Business Users - 2 hrs. each week for 4 Weeks • Training to Experienced Users - 2 hrs. each week for 4 Weeks
Support	<ul style="list-style-type: none"> • Support (L1, L2, L3) - 80 hrs. per month support • Sign Off



The **Pilot Phase milestone** will be for the Information Technology (IT) department to gain valuable knowledge, followed by Law and Justice, Health and Human Services, Land Use/Environmental Management, and General Government and related departments and sub-departments. Based on further discussion with County this may be altered to add additional department users during the Pilot Migration. After the completion of the Pilot Migration, migration for other departments will be completed in a phased manner.

The **Desktop Upgrade milestone** will start with 25% of the devices, followed by 50%, 75%, and remaining devices as per the milestones provided in the project schedule.

The **Support milestone** will be completed in 16 weeks with 80 hours of support each month during this period.

Training Approach

Complete training plan and high-level schedule

AgreeYa has provided training to hundreds of organizations since our inception in 1999. Through this experience, we have built a strong training program that helps our clients to use AgreeYa's products and services efficiently. We have multiple training programs such as end-user training, administrator training, and so on. These training are often provided in the "train-the-trainer" or user training model. AgreeYa also offers an adoption training program to our clients that focuses on increasing engagement beyond traditional "how to do what" training.

Provided below are the training plan details and high-level training schedule for the project, subject to further refinement based on County's need.



AgreeYa has, in-house as well as access to, a team of trainers focused on subject matter expertise on technology, domain, design thinking, change management, and organizational behavioral science to name a few. While AgreeYa has most of the training programs covered, including a 360-degree assessment program, we design a training program specifically for each situation as we believe each client organization is unique in terms of its culture, processes, and people. We host training sessions and center them around the customer's unique needs. These sessions are intensely hands-on. Customers are on their devices, getting right into their apps and programs as the trainer will work with them to develop personalized solutions. The result? Customers learn how to get the most out of their tools, and receive a perfectly tailored solution.

AgreeYa will leverage the **Microsoft Store Customer Success Training model** that provides a flexible format, interactive learning environment, and hands-on collaboration. Adoption of all Microsoft 365 technologies will include training County users and Microsoft 365 administrators, leveraging best practices from the Microsoft Store End User Success Training.

Proposed Training Plan for County



AgreeYa Team will assess the existing capabilities of the County team and identify the required skill set for all the users requiring training. Based on this assessment, the training curriculum would be jointly decided by AgreeYa and County. A course curriculum and detailed schedule will be published in advance to the participants. All necessary training material will be prepared by AgreeYa and approved by County to ensure adherence to standards and re-usability. County will provide a training mentor to supervise and ensure the following:

- Key objectives of the training are met
- The course materials adhere to County's standards
- The course materials have enough detail to cover all aspects of the delivered product or services

Although many organizations put less emphasis on the Training phase, we believe this phase is one of the cornerstones of our long-term relationship with our clients. AgreeYa's Knowledge Management and Transfer Process is an integral part of our SEI CMMI assessed processes. This entire methodology incorporates training and knowledge management at every stage of an engagement lifecycle and has facilitated the high level of success we have enjoyed in both the development of new systems and in ongoing support engagements.

Key steps of our training methodology are described below:

Step 1 – Curriculum Design

Based on the information collected in the analysis step, AgreeYa will start designing the training material jointly with the County team. Key activities to be completed in this step are:

- Create course design
- Create training plan
- Provide County user with training attendance documentation

The result of the curriculum design activity will be the development of a detailed Training Plan. This plan will identify a specific course outline to be developed and the delivery method along with schedule, participants, location of training among other things.

Step 2 – Training Material Development

During this step, AgreeYa Team will start preparing the training material jointly with support from the County team. In addition, AgreeYa Team will evaluate and review the training material in consultation with the County's Project Manager to update and fine-tune the content (if required). Key activities of this step are:

- Develop course content, provide materials supporting the various training focus areas, especially ensuring quality
- Review and update content

Step 3 – Training Delivery

This step relates to actual training delivery to County project team members. The County assigned mentor will facilitate the training session. In addition, we will consult with the mentor in advance and prepare the training material for the participant. The mentor will facilitate and provide all required infrastructure to print/create a soft copy of the training material.

Key activities to be completed in this step are:

- Print and produce training material
- Deliver training to the project team
- Deliver a rich-media training experience, ensuring the content is current to the most recent versions of technologies as inventoried in the EnterpriseG3 / Office365Plus + Mobility + Security subscriptions
- System Administrator training and knowledge transfer to enable effective support and management of Microsoft 365.
- Deliver an effective curriculum that includes advanced administration and technology management, especially to effectively and efficiently administrate all technical resources using the Systems Administration dashboards and interfaces as made available by the systems management environment and the Microsoft Online Administration application(s)
- Deliver an effective curriculum to demonstrate how to efficiently control the provisioning and use of virtual assets and especially identify the track, and control costs by way of the administration functionality offered with the subscription's systems administration functions;
- Deliver material that is adjusted or calibrated towards the focus areas of the role or function that will engage in the new technologies. For example:
 - Fundamentals for Beginner End-Users

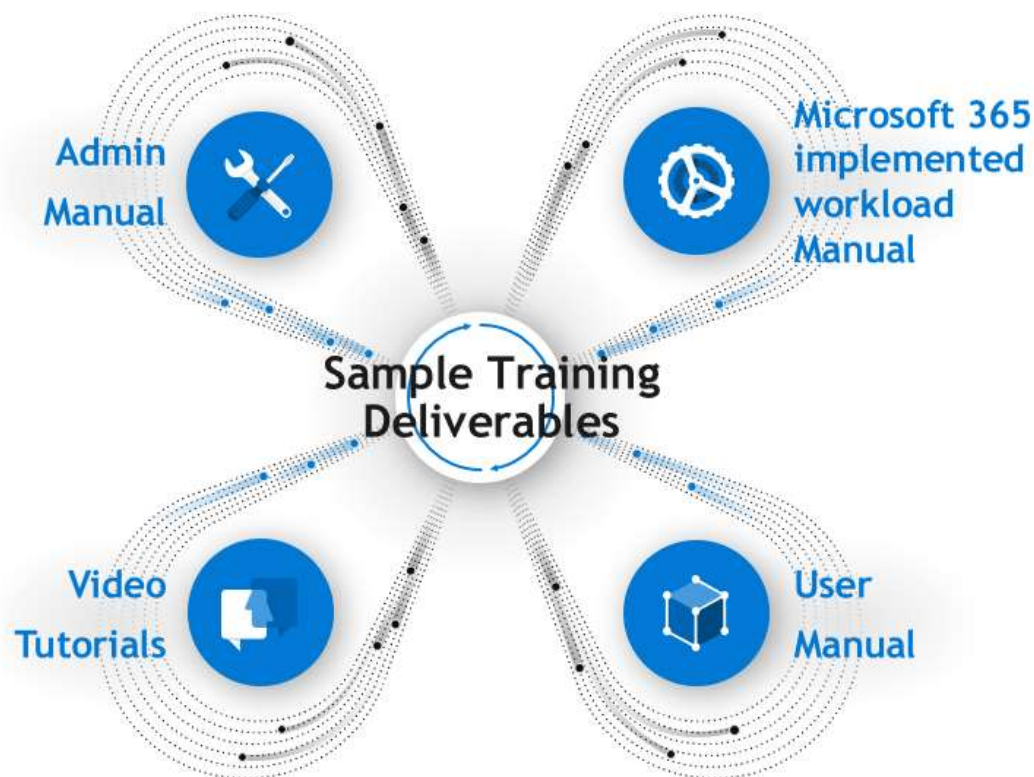
- Intermediate Training for Experienced End-Users
- Advanced Training of Features & Functions for Advanced Experienced End-Users
- Training for Technical and System Admins to Configure, Implement and Support
- Training for Technical and System Admins to Trouble-Shoot & Assist in Support
- Training for Key Personnel Identified as On-Going "Train-the-Trainer" activities

Training Approach

We have briefly described the training approach below:

- AgreeYa Team will give Training on how to use various workloads within Microsoft 365 that were implemented as part of the project
- The training will be carried out from location(s) as agreed with County
- Phase wise training schedules to be maintained
- AgreeYa Team, in conjunction with County, will conduct a detailed Training Needs Analysis
- AgreeYa Team will develop a process-based and competency-based training curriculum specific to job roles taking into consideration of all business processes
- We will also establish mandatory pre-requisite and basic skills training
- We will also deliver an online user documentation support system
- Training will be designed, developed, and delivered to cater to users as per the project requirement scope.

Training Deliverables



Training Schedule

	Type of Training	Training Mode and Environment
Technical and System Admin (5-10 people) (Train the Trainer Model)	Technical training covering how to configure, implement, troubleshoot & assist in support and day to day management of Microsoft 365 workloads	Onsite/Remote 3 sessions of 2 hours each per week
Beginner End Users (20-30 people) (Train the Trainer Model)	Fundamental for Navigation and usage of Microsoft 365 workloads	Online/ Webinar 4 sessions of 2 hours each per week
Experienced End-Users (10-20 people) (Train the Trainer Model)	Intermediate training covering access, navigation, and general usage of the new workloads deployed to Microsoft 365	Online/ Webinar 4 sessions of 2 hours each per week

As experts in their disciplines, the proposed AgreeYa team will work closely with the County staff to maximize knowledge transfer throughout the project.

Detailed end-user training sessions can be customized based on the different permission and access levels for the County users. The AgreeYa team will also produce quick reference guides customized for the County’s environment to explain common functions or actions. The AgreeYa Project Manager will work with the County Project Manager to determine if any other training materials or sessions would be beneficial to the County.

An inventory, explanation, and justification of all tools that will be used and where the County is expected to afford any tools or technologies

Below are some tools that we plan to use during this project.

- **CloudM** tool will be used for migrating content from Google Sites, Google Vault, Google Sheets, Google Docs, and Google Contacts to Microsoft 365 Tenant as the FastTrack program doesn't provide a way out for migrating these contents from Google to Microsoft Tenant.
- To create a detailed project plan – we use MS Project or Project online. If the County has Project online, we can upload the plan onto the site and County can track it there also.
- Project task tracking happens on JIRA or Azure Boards. Where epics and user stories are prioritized for each sprint and tracked and monitored to completion. The dashboards on these tools, helps us visualize the project progress at any given time
- Bug Tracking – on JIRA or Azure Boards
- Our internal team collaborations happen using MS Teams. We are power users of Teams
- Weekly project status reporting (which highlight planned activities, completed activities, issues, risks) are shared in a weekly report – either in word format or PPT format

4. Cost Proposal

Detailed task description and associated cost.

Detailed Phase/Milestone and related activities/tasks under each are provided in the **Project Schedule** section in the proposal. Provided below are the Payment Milestones.

#	Milestone	Payment
1	Assessment & Planning	\$21,966.00
2	Tenant Provisioned	\$8,410.00
3	SP, Teams, OneDrive Implementation	\$21,966.00
4	Migration Prep & Fastrack Validation	\$18,694.00
5	Pilot Migration	\$16,825.00
5.1	50% Migration Completed	\$23,882.00
5.2	Full Migration Completed	\$23,882.00
6	25% Desktop Upgrade Completed	\$6,496.00
6.1	50% Desktop Upgrade Completed	\$6,496.00
6.2	75% Desktop Upgrade Completed	\$6,496.00
6.3	100% Desktop Upgrade Completed	\$6,496.00
7	Training (For Technical and System Admin)	\$2,493.00
7.1	Training (For Beginner End Users)	\$2,493.00
7.2	Training (For Experienced End-Users)	\$2,493.00
8	1st Month Support Completed	\$7,478.00
8.1	2nd Month Support Completed	\$7,478.00
8.2	3rd Month Support Completed	\$7,478.00
8.3	4th Month Support Completed	\$7,478.00

A Not to Exceed amount which represents the sum of all tasks and related project costs necessary to successfully complete the project.

The total **Not to Exceed** amount for this project is \$199,000.00.