

**County of El Dorado
Chief Administrative Office
Procurement and Contracts Division**
solicitation on behalf of the

Information Technologies



**Request for Proposal
#21-918-040**

for

Microsoft 365 Migration Services

Submittal Deadline:

June 9, 2021, not later than 3:00 PM (PST)

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Attachment B – Fast-Track Engagement

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*The attached Sample Agreement for Services is for reference only. Other terms and conditions may apply based on the types of services and funding involved.

1.0 INTRODUCTION

The County of El Dorado (County) is soliciting sealed proposals from highly qualified and experienced firms (Consultant, Proposer, or firm) to augment staff and provide assistance with the coordination, communication, and migration from Google Workspace (formerly G Suite) Business to the Microsoft 365 (M365) Suite of products by February 2022. The intent of this solicitation is to establish an agreement with a Proposer to perform the above mentioned services on behalf of County at the most reasonable cost.

County has fifteen (15) individual departments using the Google productivity suite of tools, for which County would like to migrate to M365. Due to the complexity and scale of this migration, County is seeking a Microsoft Gold Partner, system integrator and certified Fast-Track partner to lead the formulation and implementation of the M365 and other technologies provided to a G3 tenant.

County will be transitioning from Google Workspace to the Microsoft Office 365 collaboration suite for its email, calendar, document management, and collaboration needs. This includes transitions from Gmail and Google Calendar to Microsoft Outlook and MS Exchange Online and Google Docs and Google Drive to MS Office (Word, Excel, PowerPoint), Teams, OneDrive and SharePoint. Additional information is provided in Attachment A titled "Reference Material."

County will leverage Microsoft Azure Government to house its critical infrastructure providing authentication and access to M365. This vastly improves County's availability and redundancy of services by leveraging Microsoft's Azure Government cloud-based data center for supporting M365.

County is an equal opportunity employer (EOE). All individuals are encouraged to participate. County will not discriminate against any individual because of race, religion, color, national origin, ancestry, physical handicap, mental disability, medical condition, genetic information, military or veteran status, marital status, age, gender, gender identity, gender expression, or sexual orientation.

This Request for Proposal (RFP) includes a description of the evaluation and selection process, Scope of Work, proposal requirements, sample contract, and insurance requirements.

The following schedule is for reference purposes and is subject to change:

| | |
|------------------------------|---------------|
| RFP Issuance | May 13, 2021 |
| Deadline for Final Questions | May 21, 2021 |
| Due Date for Submissions | June 09, 2021 |

In the event that it becomes necessary to revise any part of this RFP, written addenda will be issued and posted at:

<https://pbsystem.planetbids.com/portal/48157/portal-home>

Any amendment to this RFP is valid only if in writing and issued by the Chief Administrative Office, Procurement and Contracts Division. Verbal conversations or agreements with any officer, agent, or employee of the County that modify any terms or obligations of this RFP are invalid.

All interpretation or corrections, as well as any additional RFP provisions that the County may decide to include, will be made only as an official addendum that will be posted to the County's website and it shall be the Proposer's responsibility to ensure they have received all addendums before submitting a proposal. Any addendum issued by the County shall become part of the RFP and will be incorporated into the proposal.

The County will not be bound by oral responses or inquires or written responses other than written addenda.

2.0 SCOPE OF WORK

2.1 Scope of Services

The purpose of this section is to succinctly point out the major pieces of the overall Scope of Work so that any topics of concern can be addressed quickly, without being missed, due to the length of the document.

To ensure the success of the implementation, the program will include the initial activities focused on preparation, planning and readiness, and then will finalize the program with a successful transition, with staff being self-sufficient as end-users and to manage support for ongoing operations.

This overview, while detailed, may not be fully comprehensive. It is assumed a Microsoft Gold partner, experienced with Fast-Track engagements, fully understands the deliverables required for a successful engagement. At a minimum the Consultant shall:

- Initiate, assess, remediate, enable and transition to all platforms and technologies in scope (all technologies offered in the M365 G3subscriptions), in a fully operational mode, concluding in self-sufficiency to support ongoing operations;
- Provide resources to lead, direct, and perform implementation activities and will provide staff augmentation to gather requirements, lead in the planning, complete configuration implementation, and migration tasks and to knowledge transfer and train County staff in their supporting role in administration, management, maintenance and on-going operations;

- Collaborate with County’s Fast-Track team and supplement offerings with expert levels of leadership, subject matter expertise, direction, and liaison to Microsoft and Google, especially according to the prescribed roles and activities of the Fast-Track Partner as described by Microsoft in the Fast-Track products and Capabilities – refer to Attachment B titled “Fast-Track Engagement;”
- Identify all items out of scope, or not included in County’s Fast-Track services and assist County with planning and implementation activities;
- Ensure all County users are trained and able to work and collaborate with M365 tools;
- Migrate file-based data from Google Workspace, preserving as much history, formatting, and metadata as possible; provide simple manual migration methods where automated migrations are not possible;
- Migrate Google mail to Outlook online preserving as much history, formatting, and metadata as possible, including calendars and contacts;
- Improve security, data protection and privacy, and compliance by implementing automated policies to safeguard data and manage identity;
- Review and assess current Active Directory Structure and formulate a plan for implementation; and
- Minimize disruption and effort required by users to adopt M365.

2.2 Deliverables

2.2.1 All Foundational Architectures and Technologies successfully implemented

- All networking and communications (achieving optimal capacity levels of bandwidth, load-balance and demand, latency, geo-locating datacenters)
- Active directory and account setup
- Security
- Provisioning capabilities
- Administrating capabilities
- Group Policy Object capabilities needed for all M365 workloads
- Redundancy
- Servers (cloud virtual, on premise physical and virtual)
- Appliances (cloud virtual, on premise physical and virtual)
- Storage (cloud virtual, on premise physical and virtual)
- All platform and technologies identified as in need of instantiation as recommended by the Fast-Track Program recommended to County

2.2.2 Engagement Milestones

The major milestones are identified in the Fast-Track Program, and in high-level general terms they are as follows:

- Introduce, setup and plan the engagement

- Research and analyze to close all readiness gaps
- Engage a Multi-Track Program to:
 - Setup all enabling technologies and systems environments to achieve all Foundation Architectures that will enable the access, use, deployment and management needs of the program
 - Ensure the essential G3 account, communications, applications and data security features are enabled, functional and in effective operations
- Create a communication plan to ensure users are aware and prepared for migration activities. Collaborate with County to distribute communications throughout the organization.
- Deploy the common M365 applications operating on designed and defined, secure locked-down desktop configurations
- Deploy all workloads to implement and migrate to the major service platforms:
 - Azure Active Directory (AAD)
 - Azure Active Directory Premium (AADP)
 - Azure Information Protection
 - Cloud Attach
 - Exchange Online
 - Microsoft Edge
 - Microsoft Intune
 - Microsoft Teams
 - Office 365 Advanced Threat Protection
 - Office 365 Pro Plus (Desktop and Online End-User Applications)
 - OneDrive for Business
 - Outlook for iOS and Android
 - Project Online
 - SharePoint Online with Groups
 - Windows Autopilot
 - Windows 10 Deployment
 - App Assure
 - Advanced eDiscovery and Advanced Data Governance
- Finalize the design, specifications and use-cases of all special needs scenarios and complete the migration, securing of, and integrity of all data, workflows and configurations serving the

special needs of the enterprise

2.2.3 Migration Environment Preparation

At a minimum, the Consultant shall work with County to make sure each department meets the prerequisites for email migration to occur. Each department will have varying tasks associated with the preparation of their on-premises messaging environment, validate County has met or exceeded desktop requirements, and other email-related dependencies. This phase is meant to prepare each department for their email migration.

2.2.4 Training

Adoption of all M365 technologies must include training of County users and M365 administrators, utilizing Microsoft Store End User Success Training.

At a minimum, the Consultant shall:

- Deliver a comprehensive training program into the enterprise organization of County, providing the resources in staff and material across all organizational and end-user types in County;
- Deliver a training plan tailored to the County enterprise organization, a plan that is organized into tracks, swim-lanes or segments of training, depending on the structure of the Fast-Track Implementation & Migration Program. It is recommended to have the training plan formulated using the organizational chart or structure of County;
- Deliver training to the County IT technology personnel providing assistance or taking technical roles, ensuring the competency of the individual is adequate to ensure competent performance of tasks during the implementation, migration, and sustainment stages of the engagement;
- Work with County to coordinate the scheduling, space-arrangements, and ensure the training and all materials are ready and efficiently distributed/made available online and on demand;
- Provide County user training attendance documentation;
- Provide materials supporting the various training focus areas, especially ensuring quality;
- 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;

- 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, track, and control costs by way of the administration functionality offered with the subscriptions 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 Sys Admins to Configure, Implement and Support
 - Training for Technical and Sys Admins to Trouble-Shoot & Assist in Support
 - Training for Key Personnel Identified as On-Going “Train-the-Trainer” activities
- Formulate, design, and plan a “Training Communications” function, staffing and providing communications on the training program into the Enterprise to manage expectations and training planning.

2.2.5 Proposed Timeline

The migration must be completed by December 31, 2021. . Multiple department migrations will occur concurrently. This migration completion timeline is constrained by current contractual obligations expiring February 2022.

2.3 Service Levels and Quality Engagement

2.3.1 Conflict, Problem Solving, and Resolution

Two (2) Simple Work-Flows will be created by County and used to ensure that critical decision-making occurs with planned and organized steps to ensure the appropriate involvement and approval participants are part of the decision-making process, and

in events of conflicts affecting resources (human and financial), a planned and organized procedure of identifying, communicating, deliberating and electing actions or arrangements for resolution is performed effectively and efficiently.

2.3.2 Quality and Defect Management

A jointly developed list of quality insufficiencies, defects, and unresolved issues will be maintained as part of the project, and

- will be reported on in writing to ensure active measures are engaged to achieve resolution;
- will be improved upon to the county's satisfaction;
- will be used as an inventory for consideration; and
- will influence the sign-off process and sign-off outcomes.

2.3.3 Project Management and Time to Delivery

A project management arrangement will be defined organizationally, procedurally, and in role, that is satisfactory and deemed optimally effective for both organizations.

2.3.4 Work On-Site

While it is understood the management of resources will be with the most responsible party for the activities throughout the engagement, it is expected that the Consultant will work and have on-site presence, throughout the engagement, except where formally written and mutually consented arrangements are made because they are optimal to achieving the outcomes of the project. Where any remote (out of area, city, or state) activities or resources are engaged by the Consultant, then these resources will be identified pre-engagement. Off-shore resources are not prohibited as part of this engagement.

Workspace and equipment will be provided by the county, unless otherwise agreed upon by both parties.

2.4 Expected Outcomes/Objectives

A successful migration of County's Google productivity suite to M365 productivity suite will specifically address the following:

- Readiness assessment
- Collaborate with County to work with FastTrack team to Plan, Deploy, Migrate and Adopt M365 G3
- Onboard to M365 services and migrate data
- Define and configure identity and security settings
- Guide Windows 10, Office 365 ProPlus, and Microsoft Edge deployment and ensure app compatibility.

- Enable chat based collaboration and productivity apps
- Gain user adoption and realize business value
- Guidance on Governance and deployment for Microsoft Teams
- Guidance on Governance and deployment for M365 Groups
- Training and adoption of new products
- Enables Administrative tools including usage reports and setup guides
- Deployment and configuration guidance for Outlook for iOS
- Define, and Configure eDiscovery capabilities to meet public entity legal obligations, replacing the Google Vault functions
- Provide best practices and guidance on content management and data/document retention

3.0 PROPOSAL FORMAT REQUIREMENTS

Each response to this RFP shall include the information described in this section. Failure to include all of the elements specified may be cause for rejection. Additional information may be provided, but should be succinct and relevant to the goals of this RFP. Excessive information will not be considered favorably. The document shall be 8-1/2 inches by 11 inches in size or shall be folded to that size. Unnecessarily elaborate responses, enclosures, and specialized binding are not desired, and may be construed as an indication of Proposer's lack of cost consciousness.

All proposals shall contain the following elements, and in the order given:

3.1 Cover Letter shall contain the following information:

- Title of this RFP;
- Name and Mailing Address of firm (include physical location if mailing address is a P.O. Box);
- Type of organization of firm (partnership, corporation, etc.);
- Contact person and proposed Project Manager, including telephone number, fax number, e-mail address, and physical mailing address for each person;
- A statement by submitting firm indicating ability to fulfill the indemnification and insurance requirements contained in the Sample Contract. Please note that actual certificates of insurance are not required as part of your submittal;
- A statement by submitting firm requesting protection of proprietary information if necessary. All proposals may be considered public

information. Subsequent to award of this RFP, all or part of any proposal may be released to any person or firm who may request it. Therefore, proposers may request in their Cover Letter if any portion of their submittal should be treated as proprietary and not released as public information

3.2 General Requirements

Proposer shall provide documentation to satisfy the following:

- Certification as a Fast-Track and Microsoft Gold Partner with evidence of current endorsement;
- Corporate resume, evidencing experience, expertise and operational viability;
- 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 proposers shall provide the following reference information: Customer/Client name, address, Customer/Client Project Manager name, phone number, and email address);
- Profiles of personnel assigned to the program, demonstrating experience and qualifications; and
- List all exceptions to this RFP and related attachments.

3.3 Project Specific Requirements

- 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.
- Define and deliver the Project Management Plans (Risk/Issue Management, Communication Plan, Schedule Management, Resource Management and Stakeholder Engagement, and Governance)
- Clearly defined Roles & Responsibilities describing County's engagement and time commitment
- Discovery methodology and task timeline
- Identification and resolution of items out of scope in the Fast-Track program
- Migration methodology and timeline
- Complete training plan and high level schedule

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

3.4 Cost Proposal

Proposer will provide all estimates and high-level plans that support the estimates (time, operational and material resources) as part of the RFP response, including:

- Detailed task description and associated cost.
- A Not to Exceed amount which represents the sum of all tasks and related project costs necessary to successfully complete the project.

4.0 PROPOSER QUESTIONS

4.1 Questions regarding this RFP must be submitted in writing by email or U.S. mail to the Procurement and Contracts Office and must be received no later than 5:00 p.m. on **May 21, 2021**.

4.2 All emails must have “**RFP #21-918-040 – QUESTION**” as their subject, and all envelopes or containers must be clearly marked “**RFP #21-918-040 – QUESTION**” for convenience purposes. Emails, envelopes, and/or containers not clearly labeled may be overlooked and not responded to.

4.3 Questions will **not** be accepted by telephone, facsimile (fax), or orally.

4.4 The County reserves the right to decline a response to any question if, in County’s assessment, the information cannot be obtained and shared with all potential organizations in a timely manner.

4.5 A summary of the questions submitted, including responses deemed relevant and appropriate by County, will be posted to the County website on or about **June 1, 2021**. Any addenda to this RFP is valid only if in writing and issued by the County Procurement and Contracts Division.

4.6 All inquiries shall be submitted by email to: matthew.potter@edcgov.us

or by U.S. Mail to: County of El Dorado
Procurement and Contracts
330 Fair Lane
Placerville, California 95667
RFP#21-918-040 – Question

- 4.7 Proposers are cautioned that they are not to rely upon any oral statements that they may have obtained. Proposers shall direct all inquiries to the contact above and shall not contact the requesting department or other County staff directly regarding any matter related to this RFP. Information provided by other than Procurement and Contracts staff may be invalid and proposals which are submitted in accordance with such information may be declared non-responsive.

5.0 PROPOSAL SUBMITTAL INSTRUCTIONS

- 5.1 Respondents are strongly encouraged to submit their responses online to assure a complete and timely response. To respond online firms must register with the County's online bidding system, Planet Bids, at <https://pbsystem.planetbids.com/portal/48157/portal-home>. Respondents are cautioned that the timing of their online submission is based on when the submittal is RECEIVED by Planet Bids, not when a submittal is initiated by a Respondent. Online submittal transmissions can be delayed in an "Internet Traffic Jam" due to file transfer size, transmission speed, etc. For these reasons the County recommends that bidders allow sufficient time to upload their response and attachment(s) (if applicable) and to resolve any issues that may arise. The closing date and time shall be governed the Planet Bids web clock, which does not allow submittals after the closing date and time. Planet Bids will send a confirmation email to the Respondent advising that their online submission (eBid) was submitted. If you do not receive a confirmation email you are advised to contact the Planet Bids Support team by phone (818-992-1771 Monday through Friday between 7am and 5pm Pacific, excluding statutory U.S. holidays) or by submitting a Support Ticket (visit <https://solutions.planetbids.com/support/> to complete and submit the ticket form).
- 5.2 Respondents that decide to submit a hard-copy response do so at their own risk. All hard-copy proposal responses must include all of the same information required for online responses. Incomplete proposals will be rejected as non-responsive. Respondents shall submit one (1) original, three (3) hard copies and one (1) electronic copy of your proposal in PDF format on CD or on a flash/USB drive. Proposers submitting less than the required number of copies of their proposal may be rejected and considered non-responsive.
- 5.3 All submittals shall be submitted in a sealed envelope or container and clearly marked with **"RFP #21-918-040 – MICROSOFT 365 MIGRATION SERVICES – DO NOT OPEN"** on the outside of the parcel.

- 5.4** All proposals must be submitted not later than the date and time posted on the County's website. Hard-copy proposals shall be submitted ONLY to:

County of El Dorado
Procurement and Contracts Division
330 Fair Lane
Placerville, CA 95667

- 5.5** The County shall not be responsible for proposals delivered to a person or location other than specified herein. Proposals submitted to a location other than the above will not be considered duly delivered or timely. The County shall not be responsible for rerouting proposals delivered to a person or location other than that specified above.
- 5.6** Faxed or emailed proposals will not be accepted.
- 5.7** Late submittals will not be accepted or considered.
- 5.8** All submittals, whether selected or rejected, shall become the property of the County and shall not be returned.
- 5.9** The County reserves the right to waive minor defects and/or irregularities in proposals, and shall be the sole judge of the materiality of any such defect or irregularity.
- 5.10** All costs associated with proposal preparation shall be borne by the Proposer.
- 5.11** It is the responsibility of the Proposer to ensure that the proposal is received in the Procurement & Contracts Division prior to the proposal opening deadline date and time.
- 5.12** County staff will open proposals following the submittal deadline. The only information that will be made available to the public at that time will be the names of the Proposers submitting proposals. The contents of all proposals, or any other medium which discloses any aspect of the proposal, shall be held in strictest confidence until the County releases a Notice of Award or Notice of Intent to Award.
- 5.13** Any hard-copy proposal received prior to the date and time specified for receipt of proposals may be withdrawn or modified by written request of the proposer. To be considered, the modification must be received in writing, and in the same number of copies as the original proposal, prior to the date and time specified above for receipt of proposals.

6.0 EVALUATION PROCESS

Proposals will be evaluated by a County appointed selection committee and the firms submitting the most highly rated proposals may be invited for interviews. Proposals will be evaluated based on the thoroughness, clarity, and quality of the material presented. The following evaluation criteria and rating schedule will be used to determine the firm that provides the best value:

| | Evaluation Criteria | Maximum Possible Points |
|----|---|--------------------------------|
| A. | Qualifying background and relevant experience of firm and personnel in similar migrations of profile and scale. | 35 |
| B. | Project plans and methodologies | 15 |
| C. | Reference checks | 20 |
| D. | Cost Proposal | 30 |
| | TOTAL POSSIBLE POINTS | 100 |

7.0 SELECTION PROCEDURE

- 7.1** Proposals will be reviewed for responsiveness. A selection committee will then evaluate responsive proposals in accordance with the above criteria. The firm(s) submitting the highest rated proposals may be invited for an interview. Interviews will be conducted solely at the County's option. The County reserves the right to select the most qualified firm solely on the content of the proposal. If the County chooses to conduct interviews, the firm's proposed Project Manager shall represent the firm at the interview. After evaluation of the interviews, the Committee will recommend the firm with the highest overall value, based on evaluation score, for approval by the County Purchasing Agent or Board of Supervisors.
- 7.2** The County reserves the right to make an award without further discussion of the submittal with the Proposer. Therefore, the proposal should be submitted initially on the most favorable terms that the firm or individual may propose.
- 7.3** The County reserves the right to award a contract to the firm or individual who, in the sole judgment of the County, presents the most favorable response to this RFP pursuant to the evaluation criteria indicated above.
- 7.4** The County reserves the right to reject any or all proposals, to waive minor irregularities in said proposals, or to negotiate minor deviations with the successful firm. The County shall be the sole judge of the materiality of any such defect or irregularity.

- 7.5** In the case of differences between written words and figures in a proposal, the amount stated in written words shall govern. In the case of a difference in unit price versus the extended figure, the unit price shall govern.
- 7.6** The Procurement and Contracts Division does not mail out hard copy letters advising participating Proposers of RFP results. For RFP results, please visit our website at:
- <http://edcapps.edcgov.us/contracts/bidresults.asp>
- 7.7** The results of this RFP will be posted on the County's website listed in Section 7.6 above at the earliest possible opportunity in accordance with County policy. The timeline for posting RFP results may vary depending on the nature and complexity of the RFP.
- 7.8** Response and selection of a proposal will not necessarily result in the award of a contract with the County of El Dorado. Proposal opening does not constitute awarding of a contract. Contract award is by action of the Purchasing Agent or Board of Supervisors and is not in force until fully executed.
- 7.9** Once contract negotiations are initiated, the County reserves the right to select the next ranked Proposer if for any reason a contract cannot be negotiated with the selected Proposer.

8.0 EL DORADO COUNTY WEBSITE REQUIREMENTS

It is the Proposer's responsibility to monitor the County's website for possible addenda to this RFP to inform him/herself of the most current specifications, terms, and conditions, and to submit his/her proposal in accordance with original RFP requirements and all required addenda. All available RFPs and related addenda can be found at:

<https://pbsystem.planetbids.com/portal/48157/portal-home>

Failure of Proposer to obtain this information shall not relieve him/her of the requirements contained therein. Those Proposers not acknowledging and returning Addenda as required will not be considered and will be rejected as "non-responsive."

9.0 REJECTION OF PROPOSALS

Proposers interested in being considered must submit a proposal in compliance with this RFP. Failure to meet the minimum requirements of the RFP shall be cause for rejection of the proposal. The County reserves the right to reject any or all proposals.

The County may reject a proposal if it is conditional, incomplete, contains irregularities, or reflects inordinately high cost rates. County may waive immaterial deviation in a proposal at the sole determination of the County. Waiver of an immaterial deviation shall in no way modify the RFP documents or excuse the Proposer from full compliance with the contract requirements if the Proposer is awarded the contract.

10.0 VALID OFFER

Proposals shall remain valid for one hundred twenty (120) days from the due date. The County reserves the right to negotiate with the successful Proposer any additional terms or conditions not contained in their proposal which are in the best interest of the County or to otherwise revise the scope of this RFP.

This RFP does not constitute a contract or an offer of employment. The cost of preparation of proposals shall be the obligation of the Proposer. All proposals, whether accepted or rejected, shall become the property of the County and will not be returned.

11.0 COUNTY'S RIGHTS

The County reserves the right to:

1. Request clarification of any submitted information.
2. Waive any irregularity or immaterial deviation in any proposal.
3. Not enter into any agreement.
4. Not select any Proposer.
5. Cancel this process at any time.
6. Amend this process at any time.
7. To award more than one (1) contract if it is in the best interest of the County.
8. Interview Proposers prior to award.
9. To request additional information during an interview.

Waiver of an immaterial deviation shall in no way modify the RFP documents or excuse the Proposer from full compliance with the contract requirements if the Proposer is awarded the contract.

12.0 CONFLICT OF INTEREST

Proposers warrant and covenant that no official or employee of the County, or any business entity in which an official of the County has an interest, has been employed or retained to solicit or aid in the procuring of the resulting agreement,

nor that any such person will be employed in the performance of such agreement without immediate divulgence of such fact to the County. Proposer's proposal shall contain a statement to the effect that the Proposer is not currently committed to another project that would constitute a conflicting interest with the project defined in this RFP.

13.0 PUBLIC RECORDS ACT

All proposals and materials submitted shall become property of the County and will not be returned. All responses, including the accepted proposal and any subsequent contract, become public records in accordance with the requirements of the California Government Code, Sections 6250 - 6270, "California Public Records Act". Proprietary material must be clearly marked as such. Pricing and service elements of the successful proposal are not considered proprietary information. Proposers which indiscriminately identify all or most of their proposal as confidential or proprietary without justification may be deemed unresponsive.

The County will treat all information submitted in a proposal as available for public inspection once the County has selected a successful Proposer. If you believe that you have a legally justifiable basis under the California Public Records Act (Government Section 6250 et. seq.) for protecting the confidentiality of any information contained within your proposal, you must identify any such information, together with the legal basis of your claim in your proposal, and present such information **separately** as part of your response package.

Upon receipt of a request for disclosure pursuant to the California Public Records Act for information that is set apart and marked as proprietary, County will notify you of the request for disclosure. You shall have sole responsibility for the defense of the proprietary designation of such information. Failure to respond to the notice and enter into an agreement with County providing for the defense of and complete indemnification and reimbursement for all costs incurred by the County in any legal action to compel the disclosure of such information, shall constitute a complete waiver of any rights regarding the information designated proprietary and such information will be disclosed by County pursuant to applicable procedures under the California Public Records Act.

14.0 BUSINESS LICENSE REQUIREMENT

It is unlawful for any person to furnish supplies or services, or transact any kind of business in the unincorporated territory of El Dorado County without possessing a County business license unless exempt under County Code Section 5.08.070. Contact the Tax Collector's Office at 360 Fair Lane, Placerville, CA 95667, or phone (530) 621-5800, for further information.

It is not a requirement to possess a County business license at the time of proposal submittal. Selected Proposers may be required to possess a County business license to award contract.

15.0 PUBLIC AGENCY

It is intended that other public agencies (i.e., city, special district, public authority, public agency, and other political subdivisions of the State of California) shall have the option to participate in any agreement created as a result of this RFP with the same terms and conditions specified therein, including pricing. The County shall incur no financial responsibility in connection with any agreement from another public agency. The public agency shall accept sole responsibility for contracting for services and making payment to the vendor.

Attachment A

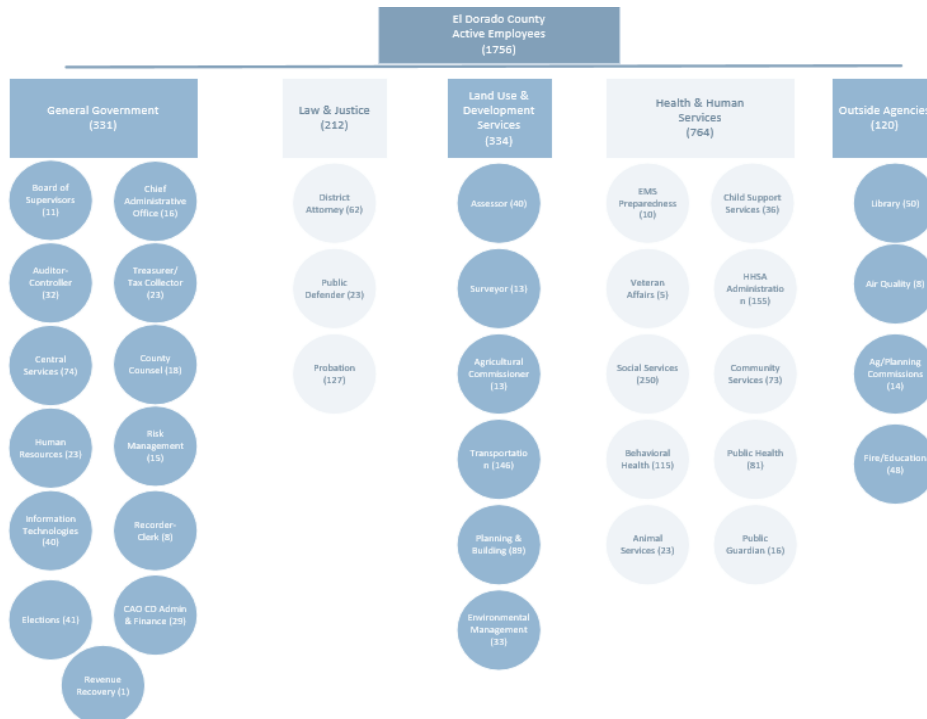
Reference Material

Environment descriptions and migration strategy suggestions

County has multiple departments, categorized in four (4) main organizational pillars: General Government, Law and Justice, Health and Human Services, and Land Use/Environmental Management. Preference would be to first migrate the Information Technology Department in order to gain valuable knowledge, followed by Law and Justice, Health and Human Services, Land Use/Environmental Management, and General Government.

Organizational Structure

| Weeks | 1 | 2 | 3 | 4 | 5 | 6 |
|--|---|---|---|---|---|---|
| Information Technologies (40) | | | | | | |
| Law and Justice (212) | | | | | | |
| Health and Human Services Agency (764) | | | | | | |
| Land Use & Developmental Services(334) | | | | | | |
| General Government (331) | | | | | | |



County Current-State Active Directory

| Active Directory | Description | Additional notes |
|---------------------------------------|---|--|
| Identity Management | Azure Active Directory | Currently implementing Azure MFA (to replace Imprivata) |
| Active Directory Domains | edcgov.us | |
| Domain Controllers | edcgov.us | Win2016, 15DC+1RO |
| Resources in AD | User accounts, Distribution groups, security group, computer accounts | |
| Single Sign On | Investigating | |
| Distribution lists | Exist in Active Directory | Some users can manage lists through 3 rd party tool. (Adaxes) |
| Dynamic Distribution Lists and Groups | Do not have | |

County Current-State Google Suite

| Google | Description | Count | Total Storage |
|---------------|-------------------------|----------------------|-------------------------|
| Gmail | Messaging, Calendaring | 1843 Mailboxes | 14TB |
| Google Vault | For eDiscovery purposes | 2,554 archived users | |
| Mailbox size | | | 3GB average, up to 35GB |
| Google Drive | | | 2TB |
| Google Sites | | 15 - 20 | Incl above |
| Google Forms | | 50 - 100 | Incl above |

County Current-State Microsoft

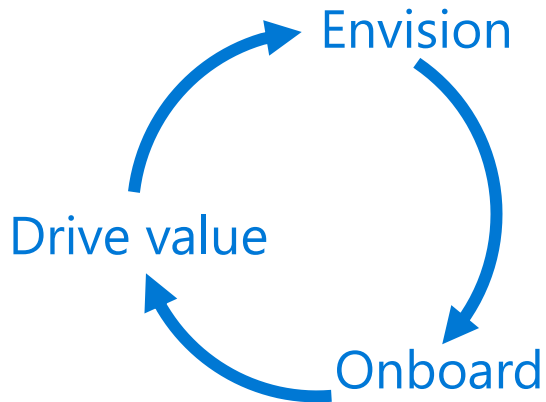
| ITEM | Description | Users |
|---------|--------------------------------|-------|
| O365 E3 | Using for MS Office Suite Only | 1600 |

County Additional Technologies

| Capability | Current Solution | Average # of Users |
|---|---|--------------------|
| Identity Management | Currently use Imprivata, plans to replace with Microsoft's MFA and Azure AD | 1800 |
| Data Loss Prevention | Investigating Microsoft DLP | 1800 |
| HelpDesk Services | iSupport | 1800 |
| Mobile Devices | iPhone, managed by Jamf. (exploring Intune) | 500 – 750 Users |
| Windows10, multiple versions. Some Windows8 | Migration to Windows10 will be complete by engagement. | 1800 |
| VOIP messaging integration, voicemail transcripts in Exchange | Avaya | 1800 |
| Non-Windows Devices | iPads, Chrome Books and Mac | 200 Devices |

Planning your FastTrack engagement

① The engagement model



Review a general FastTrack engagement to get grounded on the overall project plan.

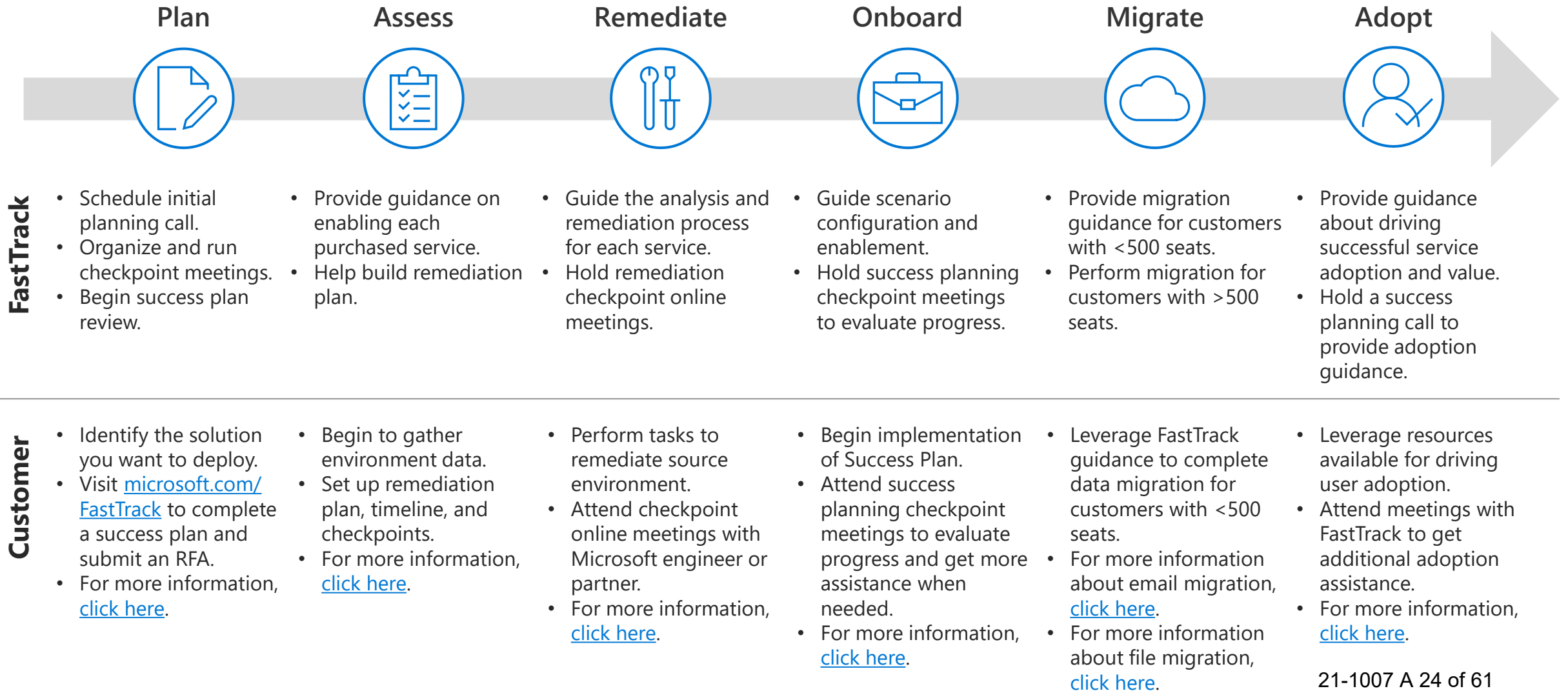
② Accessing FastTrack to deploy and adopt

- Review products and scenarios to implement
- Consider project stages and key tasks
- Clarify FastTrack and customer responsibilities
- Access tools and resources to help gain user adoption
- Plan additional workload deployments

We'll discuss your project throughout the engagement phases and set expectations in terms of execution responsibilities.

FastTrack is an ongoing benefit, which means you can use it as many times as you need throughout your subscription.

The FastTrack process for Microsoft 365



FastTrack product and capability index

Select a product to view detailed information

| | | |
|---|---|---|
| Azure Active Directory (AAD) | Microsoft Edge | Outlook for iOS and Android |
| Azure Active Directory Premium (AADP) | Microsoft Intune | Project Online |
| Azure Information Protection (AIP) | Microsoft Teams | SharePoint Online |
| Cloud-attach | Office 365 Advanced Threat Protection | Windows Autopilot |
| Exchange Online | Office 365 ProPlus | Windows 10 Deployment |
| Microsoft Defender Advanced Threat Protection | OneDrive for Business | |

Additional benefits

| | |
|--|----------------------------|
| Benefits for customers with 20,000+ Exchange Online licenses | App Assure |
|--|----------------------------|

Select a phase from the engagement process or additional benefits to view detailed information

| | | | | | | |
|----------------------|------------------------|---------------------------|-------------------------|-------------------------------|-------------------------------|-----------------------|
| Plan | Assess | Remediate | Onboard | Migrate email | Migrate files | Adopt |
|----------------------|------------------------|---------------------------|-------------------------|-------------------------------|-------------------------------|-----------------------|

FastTrack products and capabilities

Exchange Online



WHAT TO EXPECT

Microsoft FastTrack guides you through the process to get your organization ready to use email. The exact steps depend on your source environment and your email migration plans.

Microsoft FastTrack provides guidance to help customers:

- 1 Configure firewall ports and set up DNS, including the required Autodiscover, sender policy framework (SPF), and MX records, as needed.
- 2 Set up user provisioning (including licensing).
- 3 Configure email flow between the source environment and Exchange Online/Office 365.
- 4 Configure Exchange Online Protection (EOP), data loss protection (DLP), Office 365 Message Encryption (OME), and Office 365 Advanced Threat Protection (ATP) (if available in your subscription) and verify your MX records point to Office 365 for all validated mail-enabled domains.
- 5 Configure hybrid setup either between a single on-premises Exchange organization and Office 365 *or* between multiple on-premises Exchange organizations and Office 365.
- 6 Configure mailbox clients (Outlook for Windows, Outlook on the web, and Outlook for iOS and Android).

Integrating on-premises IP-PBX systems with Exchange Online Unified Messaging is not supported in GCC High and DoD subscriptions.

Customers who purchase at least 20,000 licenses for an Exchange Online tenant are eligible for [additional benefits](#).

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

SOURCE ENVIRONMENT

Your environment must have one of the following minimum levels:

Single or multiple Exchange organizations with Exchange Server 2003 onward

A single IBM Domino 7.0.3 onward environment ([Appendix A: Migration from IBM Domino to Exchange Online](#))

A single Internet Message Access Protocol (IMAP)-capable email environment

G Suite environments (Gmail, Contacts, and Calendar only).

A single Novell GroupWise 7.0.4 onward environment

Additional detail on email migration >

SharePoint Online



WHAT TO EXPECT

Microsoft FastTrack provides guidance on data migration to Office 365 by using a combination of tools and documentation and by performing configuration tasks where applicable and feasible.

Microsoft FastTrack provides guidance to help customers:

- 1 Configure firewall ports and set up DNS.
- 2 Provision users and licenses and enable site creation for your SharePoint Online admin.
- 3 Demonstrate the creation of site collections, secure content, and the managing of permissions.
- 4 Enable personal sites and social features; and configure SharePoint Online features.
- 5 Configure SharePoint hybrid features, like hybrid search, hybrid sites, hybrid taxonomy, content types, hybrid self-service site creation (SharePoint Server 2013 only), extended app launcher, hybrid OneDrive for Business, and extranet sites.
- 6 Use tools and automation to:
 - Configure on-premises cloud search service applications.
 - Configure trust between SharePoint on-premises and cloud environments.


Refer to the [Office 365 GCC High and DoD restrictions](#) for SharePoint Online.

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

SOURCE ENVIRONMENT

File shares (Server Message Block (SMB) file shares on devices supporting SMB 2.0 onward).

Box (Starter, Business, Enterprise).

Additional detail on file migration 

OneDrive for Business



WHAT TO EXPECT

For OneDrive for Business, the steps depend on if you're currently using SharePoint, and if so, which version.

Microsoft FastTrack provides guidance to help customers:

- 1 Identify the on-premises SharePoint version; integration options; review on-premises and online network infrastructure and bandwidth; identify synchronization and identity options.
- 2 Prepare the on-premises environment for OneDrive for Business deployment:
 - Identify the correct OneDrive for Business sync client.
 - Configure the DNS, network ports, and firewall.
- 3 Plan and implement the appropriate rollout option: just-in-time or staged (sequenced and phased).
- 4 Install SharePoint 2013 SP1*, plan and implement sync and identity requirements, and identify OneDrive for Business sync client.
- 5 Configure SharePoint Online hybrid OneDrive for Business redirection (SharePoint 2013 and SharePoint 2016 only).
- 6 Assign user licenses; redirect My Sites and personal document libraries to Office 365 (as needed*); and set up SharePoint Online audiences to control and govern who gets OneDrive for Business.
- 7 Deploy the OneDrive for Business sync client.

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

SOURCE ENVIRONMENT

File shares (SMB file shares on devices supporting SMB 2.0 onward).

A single G Suite environment (Google Drive only).

Box (Starter, Business, Enterprise).

Note: FastTrack only migrates to active Office 365 drives.

[Additional detail on file migration](#) >

Office 365 ProPlus



WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Address deployment issues.
- 2 Apply user-based or device-based licensing. This includes assigning user licenses using the [Microsoft 365 admin center](#) and Windows PowerShell and provision Office 365 ProPlus.
- 3 Install Office 365 ProPlus from the Office 365 portal using Click-to-Run.
- 4 Install Office Mobile apps (like Outlook for iOS and Android, Word Mobile, Excel Mobile, and PowerPoint Mobile) on your iOS, Android, or Windows Mobile devices.
- 5 Configure update settings using the Office 365 Deployment Tool.
- 6 Select and set up a local or cloud installation; set up single on-site distribution server.
- 7 Create the Office Deployment Tool configuration XML with the Office Customization Tool or native XML to configure the deployment package.
- 8 Deploy with System Center Configuration Manager, including assistance with the creation of System Center Configuration Manager packaging.
- 9 Provide guidance about the client servicing model

Customers who purchase at least 20,000 licenses for an Exchange Online tenant are eligible for [additional benefits](#).

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

NOTES

Office 365 ProPlus desktop apps include:

- Outlook
- Word
- Excel
- PowerPoint
- Teams
- OneNote
- Access (PC only)

Office Mobile apps include:

- Outlook Mobile
- Word Mobile
- Excel Mobile
- PowerPoint Mobile
- OneNote Mobile

Microsoft Teams



WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Confirm minimum requirements; configure firewall ports; set up DNS; confirm Teams is enabled on your Office 365 tenant; and enable or disable user licenses.
- 2 Distribute the Teams client.
- 3 Create accounts to associate to supported room system devices (up to 10 accounts).
- 4 Enable Direct Routing for a single site only.
- 5 Enable Audio Conferencing, including setting up conference bridge default settings and assigning conference bridges to licensed users.
- 6 Enable Phone System and Calling Plans (in available markets), including:
 - Configure cloud voice and set up accounts and bridge lines for audioconferencing.
 - Assign numbers to licensed users.
 - Port local numbers UI up to 999; and support local number porting over 999.
- 7 Enable Teams Live Events.
 - Set up the organization and integrate into Microsoft Stream.

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

NOTES

Direct Routing for GCC High and DoD environments

Phone System and Audio Conferencing for GCC High and DoD environments are being delivered via Direct Routing. For more information, see the service level documentation here:

- [Phone System availability in GCC High and DoD](#)
- [Audio Conferencing with Direct Routing for GCC High and DoD](#)

Enabling Direct Routing

Organization setup guidance for Direct Routing design of partner-hosted scenarios, or customer-deployed scenarios for a single site.

Project Online



WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Review subscription plans.
- 2 Verify basic SharePoint functionality.
- 3 Add the Project Online service to your tenant (including adding subscriptions to users).
- 4 Set up the Enterprise Resource Pool (ERP).
- 5 Add users to Project Online including ERP Sync.
- 6 Verify basic Project Online functionality by creating a project.

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

NOTES

For Office 365 US Government plans, Project Online is not included, but can be purchased as a separate add-on. Project Online includes Project Online Desktop Client as a part of the subscription.

Refer to [Docs](#) for additional information on Project Online Professional and Project Online Premium.

Office 365 Advanced Threat Protection



WHAT TO EXPECT

Microsoft FastTrack provides **guidance** to help customers:

- 1 Configure recommended eligible services settings.
- 2 Provision your infrastructure.
- 3 Configure:
 - [Threat protection policies](#): Define threat-protection policies to set the appropriate level of protection for your organization.
- 4 Set up the following scenarios:
 - [Reports](#): View real-time reports to monitor ATP performance in your organization.
 - [Threat investigation and response capabilities](#): Use leading-edge tools to investigate, understand, simulate, and prevent threats.
 - [Automated investigation and response capabilities](#): Save time and effort investigating and mitigating threats.

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

NOTES

Customers with 150 or more seats of Office 365 Advanced Threat Protection, Office 365 E5, or Microsoft 365 E5 will be able to use FastTrack to deploy this service.

Office 365 Advanced Threat Protection (ATP) safeguards your organization against malicious threats posed by email messages, links (URLs), and collaboration tools.

Additionally, ongoing management and threat response are outside of the benefits.

For more information:

- Review the [Office 365 Advanced Threat Protection service description](#)
- Visit the FastTrack site to make a [Request for Assistance](#).

Azure Active Directory (AAD)



WHAT TO EXPECT

When all remediation activities are complete, core onboarding for service consumption and provisioning of each eligible EMS cloud service begins. Core onboarding involves service provisioning and tenant and identity integration. It also includes steps for providing a foundation for onboarding online services like Azure Active Directory (AD) Premium, Intune, and Azure Information Protection.

Microsoft FastTrack provides guidance to help customers:

- 1 Add IT admins to Azure AD.
- 2 Configure management prerequisites.
- 3 Determine customer authentication method of PHS, PTA, or Federated with AD FS.
- 4 Set up AAD Connect directory synchronization with [managed or federated \(ADFS\) authentication](#).
- 5 Set up AD FS farm, add an additional federation server to existing AD FS farm, and verify Single Sign-On (SSO); set up AD FS Proxy and verify access.
- 6 Configure test users.
- 7 Validate core identity management use cases.
- 8 Enable single sign-on for multiple applications (up to 10 applications and unlimited applications for Premium SKUs).

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

NOTES

The on-premises Active Directory and its environment are prepared for Azure AD, which includes remediation of identified issues that prevent integration with Azure AD and Azure AD Premium features.

FastTrack assists with preparing on premises Active Directory for integration with Azure AD as a prerequisite for onboarding Office 365 workloads, as well as assists with Azure AD Premium features for customers with the appropriate plans.

For GCC High and DoD tenants Azure Active Directory Pass-through Authentication and Azure Active Directory Seamless Single Sign-On (SSO) are not available.

Azure Active Directory Premium (AADP)



WHAT TO EXPECT

When all remediation activities are complete, core onboarding for service consumption and provisioning of each eligible EMS cloud service begins. Core onboarding involves service provisioning and tenant and identity integration. It also includes steps for providing a foundation for onboarding online services like Azure Active Directory (AD) Premium, Intune, and Azure Information Protection.

Microsoft FastTrack provides guidance to help customers:

- 1 Configure and set up the in-scope AADP features as documented in the [FastTrack Center Benefit Process for Enterprise Mobility + Security \(EMS\)](#).
 - Azure AD P1 in-scope features for FastTrack SSPR/SSGM, Azure AD MFA, SaaS app integration with SSO and outbound provisioning for Azure AD Marketplace apps, Azure AD App Proxy, Azure AD Connect Health, Azure AD Conditional Access, Azure AD TOU, Azure AD Password Protection, Azure AD B2B.
 - Azure AD P2 in-scope features for FastTrack Azure AD Identity Governance features (PIM, Access Reviews), Azure AD Identity Protection, Risk Based Conditional Access.
- 2 Configure test users and policies.

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

NOTES

Azure AD Pass-through Authentication for multiple-forest environments is supported if there are forest trusts between your AD forests and if name suffix routing is correctly configured. Additional agents can be installed on multiple on-premises servers to provide high availability for sign-in requests.

Password hash sync and password writeback support multiple forests. However, other writeback scenarios aren't supported.

Out of scope:

- Development and implementation for custom rules extensions.
- For all multiple forest configurations, AD FS deployments.

Microsoft Intune



WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Configure identities to be used by Intune by leveraging either your on-premises Active Directory or cloud identities.
- 2 License users and add users to your Intune subscription, define IT admin roles, and create user and device groups.
- 3 Configure your Mobile Device Management (MDM) authority, based on your management needs, including:
 - Set Intune as your MDM authority and configure tests groups to be used to validate MDM management policies.
 - Navigate the Intune admin portal to locate information on users and devices.
 - Set up Intune roles (Help desk operator, admins, etc.)
 - Configure MDM management policies and services; set up conditional access policies.
 - Configure and deploy Intune app protection policies for each supported platform.
 - Prepare line-of-business (LOB) apps for Intune app protection policies, with guidance on available options.
 - Enroll devices of each supported platform to your Intune or Configuration Manager with Microsoft Intune service.
 - Connect to Intune Data Warehouse and integrate Intune with other solutions, as required.
 - Configure software updates for applicable supported platforms.
 - Resources for user adoption planning
- 4 Set up Windows Autopilot:
 - Configure and set up Microsoft Intune for Windows Autopilot and Azure AD dynamic groups. Create and assign devices to Windows Autopilot profiles (e.g., a profile that restricts Local Administrator account creation).
 - Add your Company branding into Azure AD.
 - Customize the Out-of-box-experience (OOBE) to comply with organization's requirements.
 - Configure MDM auto-enrollment in Azure AD and Intune.

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

NOTES

When all remediation activities are complete, core onboarding begins. Core onboarding involves service provisioning and tenant and identity integration. It also includes steps for providing a foundation for onboarding online services like Azure Active Directory (AD) Premium, Intune, and Azure Information Protection.

FastTrack does not support Windows 10 classic PC management with Intune. FastTrack only supports Windows 10 device management through Intune mobile device management (MDM).

Setting up Windows Autopilot outside Intune is out of scope for the FastTrack benefit.

Windows Autopilot



WHAT TO EXPECT

FastTrack can help you through simplifying your device provisioning with Windows Autopilot and Intune by giving new devices to your end users without the need to build, maintain and apply custom operating system images to your devices.

Microsoft FastTrack provides guidance to help customers:

- 1 Configure and set up Microsoft Intune for Windows Autopilot.
- 2 Configure Azure Active Directory (AD) dynamic groups.
- 3 Add your company branding into Azure AD.
- 4 Create and assign devices to Windows Autopilot profiles (e.g., a Windows Autopilot profile that restricts Local Administrator account creation).
- 5 Customize the out-of-box-experience (OOBE) to comply with organization's requirements.
- 6 Configure MDM Auto-enrollment in Azure AD and Intune.

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

NOTES

FastTrack supports the following Autopilot scenarios:

- **Azure AD self-service:** Devices join Azure AD and enroll in Intune. This scenario is supported when using Windows 10 1703 and latest versions.
- **Hybrid AAD self-service:** Devices join both on-premises AD and Azure AD and enroll in Intune. This scenario is supported when using Windows 10 1809 and latest versions.
- **Self-provisioning:** Devices automatically join Azure AD. This scenario is supported when using Windows 1809 and latest versions.

For the list of OEMs and resellers that support Autopilot, see the "Participant device manufacturers" and "Participant device resellers" sections of the Windows Autopilot information page: <https://aka.ms/windowsautopilot>

Supported deployments/upgrades: In-Place Upgrade, Wipe and Reload, and Autopilot for existing devices using SCCM. We also support autopilot for devices provisioning 201907 A 37 of 61

Deploy Outlook for iOS and Android securely



WHAT TO EXPECT

FastTrack can provide guidance to help you deploy Outlook for iOS and Android securely in your organization to ensure your users have all the required apps installed.

Microsoft FastTrack provides guidance to help customers:

- 1 Download Outlook for iOS and Android, Microsoft Authenticator, and the Intune Company portal app via the Apple App Store or Google Play Store.
- 2 Set up:
 - Outlook for iOS and Android, Microsoft Authenticator, and the Intune Company portal app deployment with Intune.
 - App protection policies
 - Conditional access policies
 - App configuration policies

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

NOTES

The FastTrack team does not support securing Outlook for iOS and Android with Exchange mobile device mailbox policies.

Cloud-attach



WHAT TO EXPECT

FastTrack explains the benefits of cloud-attach and guides you through getting ready to cloud-attach your existing Configuration Manager environment(s) with Intune.

Microsoft FastTrack provides guidance to help customers:

- 1 Provision and license users and configure identities to be used by Intune by leveraging either your on-premises Active Directory and/or cloud identities.
- 2 Activate volume licenses for your Microsoft cloud service tenant (as needed).
- 3 Add users to your Intune subscription, define IT admin roles, and create user and device groups.
- 4 Enable Client Attach (Co-Management) and Tenant Attach in the Configuration Manager console.
- 5 Set up hybrid Azure Active Directory Join; set up Azure Active Directory for MDM auto-enrollment; and set up Cloud Management Gateway.
- 6 Configure supported workloads that you want to switch to Intune.
- 7 Install the Configuration Manager client in Intune enrolled devices.
- 8 Monitor cloud-attach activity in your environment and validate all policy results.

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

NOTES

For information about Intune App Protection (app management) and Intune device (MDM) and app management (standalone), visit <https://docs.microsoft.com/en-us/fasttrack/ems-onboarding-phases>

Azure Information Protection (AIP)



WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Activate and configure their tenant.
- 2 Create and set up labels and policies.
- 3 Apply information protection to documents.
- 4 Automatically classify and label information in Office apps (like Word, PowerPoint, Excel, and Outlook) running on Windows and using the Azure Information Protection client.
- 5 Use files at rest using the Azure Information Protection scanner.
- 6 Monitor emails in transit using Exchange Online mail flow rules.

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

NOTES

Guidance is also provided to customers who want to apply protection using:

- Microsoft Azure Rights Management Services (Azure RMS)
- Office 365 Message Encryption (OME)
- Data loss prevention (DLP).

Azure Information Protection is not included, but can be purchased as a separate add-on and will enable the supported Information Rights Management (IRM) features. Some Azure Information Protection features require a subscription to Office 365 ProPlus, which is not included with Office 365 Government G1 or Office 365 Government F1.

For more information, visit [What is Azure Information Protection?](#)

Windows 10 deployment



WHAT TO EXPECT

Microsoft FastTrack provides Windows 10 deployment guidance to upgrade from Windows 7 and/or Windows 8.1 to Windows 10 Enterprise.

Microsoft FastTrack provides guidance to help customers:

- 1 Deploy Windows 10 Enterprise using Microsoft System Center Configuration Manager or Microsoft 365.
- 2 Deploy Office 365 ProPlus.
- 3 Update Windows 10 Enterprise and Office 365 ProPlus using System Center Configuration Manager or Microsoft 365.
- 4 Cloud-attach Configuration Manager with Microsoft Intune or deploy Intune as the sole cloud management solution.

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

SOURCE ENVIRONMENT

For PC upgrade, you must meet these requirements:

- Source OS: Windows 7 Enterprise; Windows 8.1 Enterprise or Professional
- Target OS: Windows 10 Enterprise
- Devices: Desktop, notebook, or tablet form factor

For infrastructure upgrade, you must meet these requirements:

- System Center Configuration Manager (Current Branch) version 1902 onward
- The Configuration Manager version must be supported by the Windows 10 target version

For more information, see the Configuration Manager support table at [Support for Windows 10 in Configuration Manager](#).

Request assistance at www.microsoft.com/fasttrack 21-1007-A 41 of 61

App Assure



WHAT TO EXPECT

When you purchase any of the Windows 10 or Microsoft 365 services (as detailed in [Eligible Services and Plans](#)), FastTrack Specialists provide advisory and remediation guidance if you encounter app compatibility issues as you deploy newer Microsoft products as outlined in [Supported Microsoft products](#). To get help, complete the [App Assure service request](#).

FastTrack provides remediation assistance for apps deployed on the following Microsoft products:

- 1 Windows 10 and Office 365 ProPlus:** Apps that worked on Windows 7, Windows 8.1, Office 2010, and Office 2013 also work on Windows 10 and Office 365 ProPlus.
- 2 The new Microsoft Edge:** If your web apps or sites work on Internet Explorer 11, Google Chrome, or Microsoft Edge legacy, they'll also work with the new Microsoft Edge.
- 3 Windows Virtual Desktop:**
 - Virtualized apps that run on Windows Server Remote Desktop Session Host (RDSH) also run on Windows 10 Enterprise multi-session as part of Windows Virtual Desktop.
 - Apps running on any Windows 7 or Windows 10 virtual desktop infrastructure (VDI) environment also run on Windows 7 Enterprise and Windows 10 Enterprise as part of Windows Virtual Desktop.*
 - Apps running on Windows 7 or Windows 10 client devices also run on Windows 7 Enterprise and Windows 10 Enterprise as part of Windows Virtual Desktop.*

* Windows 10 Enterprise multi-session compatibility exclusions and limitations include:

 - Limited redirection of hardware.
 - A/V-intensive apps may perform in a diminished capacity.
 - 16-bit apps aren't supported for 64-bit Windows Virtual Desktop.

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

Customers are also responsible to: create an app inventory and validate apps on Windows 10 and Microsoft 365 Apps.

NOTES

FastTrack doesn't assist with:

- App inventory and testing to determine what does and doesn't work on Windows 10 and Office 365 ProPlus. For more guidance on this process, visit the [Desktop Deployment Center](#). If you're interested in an in-depth upgrade readiness assessment, complete the [Customer Request for Modern Desktop Assessment](#) form.
- Researching third-party ISV apps for Windows 10 compatibility and support statements. For more information, see [Desktop Analytics](#).
- App packaging-only services. However, the App Assure team packages apps that we have remediated for Windows 10 to ensure they can be deployed in the customer's environment.

Assistance is provided in Traditional Chinese and Simplified Chinese (resources speak Mandarin only), English, French, German, Italian, Japanese, Korean, Portuguese (Brazil), and Spanish.

Microsoft Defender Advanced Threat Protection



WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Configure recommended eligible services settings.
- 2 Provision your infrastructure.
- 3 Configure:
 - [Endpoint Detection and Response \(EDR\)](#) – Microsoft Defender ATP endpoint detection and response capabilities provide advanced attack detections that are near real-time and actionable.
 - [Next Generation Protection \(NGP\)](#) – Windows Defender Antivirus is a built-in antimalware solution that provides next generation protection for desktops, portable computers, and servers.
 - [Attack Surface Reduction \(ASR\)](#) – FastTrack provides benefits around network protection, controlled folder access, and the configuration of rules under Attack Surface Reduction.
- 4 Set up the following scenarios:
 - [Threat Vulnerability Management \(TVM\)](#) – Discover vulnerabilities and misconfigurations in real-time based on sensors, without the need for agents or periodic scans.
 - [Automated Investigation and Remediation \(Auto IR\)](#) – Microsoft Defender ATP uses Automated investigations to significantly reduce the volume of alerts that need to be investigated individually.

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

NOTES

Customers with 150 or more seats of Microsoft Defender Advanced Threat Protection, Windows 10 E5, or Microsoft 365 E5 will be able to use FastTrack to deploy Microsoft Defender Advanced Threat Protection and to learn best practices.

For Attack Surface Reduction (ASR): hardware-based isolation, application control, exploit protection, and network firewall are outside of the benefits.

Additionally, ongoing management and threat response are outside of the benefits.

For more information:

- Visit [What is Microsoft Defender Advanced Threat Protection?](#)
- Visit the FastTrack site to make a [Request for Assistance](#).

Microsoft Edge



WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Deploy the new Microsoft Edge on Windows 10 Enterprise with System Center Configuration Manager or Intune.
- 2 Configure Microsoft Edge (using group policies or Intune app configuration and app policies).
- 3 Inventory the list of sites that may be required to run in IE mode.
- 4 Enable Internet Explorer (IE) mode with existing Enterprise Site List.
- 5 Provide adoption kit with communication samples. Customer is responsible for building and executing a change management plan.

Throughout the engagement, customers are responsible to: configure recommended settings and execute needed remediations; provide project management of your resources; attend checkpoint meetings; and implement user communications, documentation, training, and change management.

NOTES

FastTrack provides deployment guidance for the new Microsoft Edge for customers with licenses for 150 seats or more of Windows 10 Enterprise.

Customers must already be running Windows 10.

Additionally, if you have a web app or site that works with Internet Explorer or Google Chrome and you experience compatibility issues, we will fix it at no additional cost through the App Assure program.

Request assistance at <http://www.Microsoft.com/FastTrack>.

The FastTrack engagement



1. Plan



KEY TASKS

Microsoft FastTrack responsibilities

- 1 Work with customer to understand intent, organizational goals, and usage plans for the service(s).
- 2 Conduct kick-off meeting; clarify roles and responsibilities.
- 3 Provide guidance on Success Plan creation: Scope (including services to onboard and data to migrate), timelines, and contacts.
- 4 Provide guidance needed for project governance. Participate in checkpoints.
- 5 Provide guidance to customer on adoption best practices and best way to drive usage.

Customer responsibilities

- Provide key business scenarios and success criteria for organization deployment and adoption.
- Identify and enlist core planning team.
- Build Success Plan. Define scope, timelines, and contacts.
- Manage and lead project governance and establish checkpoints.
- Begin creating the adoption plan and continue those efforts throughout the engagement process.

OUTCOME

Signed-off Success Plan.

NOTES

Sign in to the [FastTrack site](#) to request services or request assistance from FastTrack.



2. Assess



KEY TASKS

| | Microsoft FastTrack responsibilities | Customer responsibilities |
|---|---|---|
| 1 | Align resources for online meetings and conduct Discovery Workshop. | Participate in Discovery Workshop and all assessment meetings. |
| 2 | Run tools to gather environment data and estimate bandwidth requirements. | Provide the FastTrack team with access and permissions to necessary infrastructure. |
| 3 | Assess results and create remediation checklist, plan, timeline, and checkpoints. | Contribute to the remediation plan, timeline, and checkpoints. Sign off on checklist. |
| 4 | Build schedule for onboarding and migration (if applicable). | Identify appropriate onboarding stakeholders and timing. |

TIPS

- Ensure key stakeholders attend the Discovery Workshop, which addresses:
 - Browsers, OSs, applications
 - DNS, network, and basic infrastructure
 - Identity management
 - Services to enable and adoption guidance
 - Mailbox or files to migrate (if needed)
- Engage security, compliance, cyber, and audit teams.

OUTCOME

Remediation plan that brings source environment to the minimum requirements for successful onboarding and migration (if needed).



3. Remediate



KEY TASKS

| | Microsoft FastTrack responsibilities | Customer responsibilities |
|---|---|--|
| 1 | Conduct online remediation checkpoint meetings to review progress of activities and success planning. | Participate in checkpoint meetings. |
| 2 | Guide customer through assessment tools to identify and remediate issues and interpret results. | Perform tasks to remediate source environment. |
| 3 | Verify the outcomes of remediation activities to make sure customer is ready to proceed. | Check source environment post-remediation. |

TIPS

- Prioritize the services you plan to enable based on your business needs.
- Make sure that skilled people are available when they are needed.
- May need to allocate training time for individuals performing remediation.

OUTCOME

Environment ready for onboarding.

4. Onboard



KEY TASKS

| | Microsoft FastTrack responsibilities | Customer responsibilities |
|-----------|--|--|
| 4A | Provide guidance on core onboarding activities. | Perform core onboarding activities. |
| 4B | Provide guidance on identity integration activities. | Perform identity integration activities. |
| 4C | Provide guidance on service enablement activities. | Perform service enablement activities. |

OUTCOME

Key enablement tasks have been completed.

The screenshots show the following content:

- 4A. Core Onboarding:** Key tasks include providing guidance on provisioning and integration, adding domains, mailbox migration, and mailbox migration. Customer responsibilities include ensuring tenant readiness, adding domains, and mailbox migration. Outcome: Tenant and service workloads are ready.
- 4B. Identity integration:** Key tasks include setting up and verifying directory sync, implementing and provisioning on-premise identities, and federated sync. Customer responsibilities include using Azure AD Connect, installing AD FS, and configuring on-premise identities. Outcome: Accounts are created in the tenant, are ready, and have access.
- 4C. Service enablement:** Key tasks include configuring DNS and firewall, setting up user provisioning, creating or updating Azure AD roles, and configuring settings and display names. Customer responsibilities include configuring DNS and firewall, setting up user provisioning, creating or updating Azure AD roles, and configuring settings and display names. Outcome: Tenant and service workloads are provisioned.



4A. Core Onboarding



KEY TASKS

| | Microsoft FastTrack responsibilities | Customer responsibilities |
|---|---|--|
| 1 | Provide guidance on provisioning and integration. | Ensure that your core onboarding activities involve service provisioning and tenant and identity integration. |
| 2 | Provide guidance on activating the tenant and configuring test client. | Activate tenant and configure test client. |
| 3 | Provide guidance on adding domain and verifying ownership. | Add domain in tenant and verify ownership. |
| 4 | Provide guidance on transitioning pilot users. | Transition pilot users. |
| 5 | Provide guidance on configuring TCP/IP ports, protocols, firewall; and DNS for eligible services. | Configure TCP/IP ports, protocols, firewall; and DNS for eligible services. |
| 6 | Provide guidance on validation. | Validate network connectivity. |
| 7 | Participate in success planning checkpoint meetings with customer. | Continue to have success planning checkpoint meetings with your FastTrack Manager to evaluate progress against goals and determine what further assistance you need. |

OUTCOME

Tenant and service workloads are ready.

SOURCE ENVIRONMENT

Active Directory forests with the functional forest level set to Windows Server 2003 onward, with one of the following forest configurations:

- A single Active Directory forest.
- A single Active Directory account forest and resource forest (Exchange and/or Lync 2010, Lync 2013, or Skype for Business) topologies.
- Multiple Active Directory account forests and resource forest (Exchange and/or Lync 2010, Lync 2013, or Skype for Business) topologies.
- Multiple Active Directory account forests with one of the forests being a centralized Active Directory account forest that includes Exchange and/or Lync 2010, Lync 2013, or Skype for Business.
- Multiple Active Directory account forests, each with its own Exchange organization.



4B. Identity integration



KEY TASKS

| Microsoft FastTrack responsibilities | Customer responsibilities |
|--|---|
| Identity integration using online setup: | |
| 1 Provide guidance on setting up and verifying directory sync. | Use Azure AD Connect to set up and verify directory sync. |
| 2 Provide guidance on implementing and provisioning online identities. | Implement and provision online identities without directory sync. |
| Identity integration using federated setup: | |
| 1 Provide guidance on validation. | Use Azure AD Connect to set up and verify directory sync. |
| 2 Provide guidance on installation. | Install ADFS farm, ADFS Proxy/WAP, SSL certificate (if needed). |
| 3 Provide guidance on configuration and validation. | Configure and validate ADFS farm and WAP. |
| 4 Provide guidance on conversion, configuration, and validation. | Convert registered domains, configure and validate federation. |
| 5 Provide guidance on implementation. | Implement Client Access Policies on ADFS (if needed). |

OUTCOME

Accounts are created in the tenant, are ready, and have access.

NOTES

- AD stands for Active Directory.
- ADFS stands for Active Directory Federation Services.
- WAP stands for Web Application Proxy.
- SSL stands for Secure Sockets Layer.
- Onboarding for one or more eligible services can begin once core onboarding is finished.



4C. Service enablement



KEY TASKS

| | Microsoft FastTrack responsibilities | Customer responsibilities |
|---|---|---|
| 1 | Provide guidance DNS and firewall. | Configure DNS and firewall. |
| 2 | Provide guidance on user provisioning. | Set up user provisioning (including licensing). |
| 3 | Provide guidance on Autodiscover and SPF. | Create or update Autodiscover and SPF. |
| 4 | Provide guidance on configuration and deployment. | Configure settings and deploy client. |
| 5 | Provide guidance on migration approach. | Establish migration approach, if applicable. |

OUTCOME

Tenant and service workloads are provisioned.

NOTES

FastTrack provides guidance on the following services: Office 365 ProPlus, Exchange Online, SharePoint Online, OneDrive for Business, Skype for Business, Microsoft Teams, Azure Active Directory Premium, and more. DNS stands for Domain Name Server. SPF stands for Sender Policy Foundation.

5A. Migrate email



WHAT'S INCLUDED AS OF MARCH 2018

What mail environments are migrated as part of the FastTrack service?

- Exchange 2003 onward (single or multiple AD forests with single or multiple Exchange organizations)
 - A single IBM Domino 7.0.3 onward environment
 - A single IMAP-capable email environment
 - A single G Suite environment (Gmail, Contacts, and Calendar only)
 - A single Novell GroupWise 7.0.4 onward environment
- All source environments must be on the latest service packs (SP) and rollup (RU)/cumulative update (CU) level.

| Source | Examples of what's included | Examples of what's NOT included |
|---|---|---|
| <p>Exchange</p> <p>See FastTrack Service description for a complete list.</p> <p>Note: Exchange 2010 forward will migrate personal archives, but not archived data from PST files.</p> | <ul style="list-style-type: none"> • Emails • Mailbox rules • Delegates • Mailbox contacts • Calendar • Tasks | <ul style="list-style-type: none"> • Public folders • Personal contacts • Mail-enabled users • Signature • Mailbox dumpster • Emails that exceed the message size limit • Rights managed or encrypted emails |
| <p>Domino, G Suite, GroupWise, IMAP</p> <p>See FastTrack Service description for a complete list.</p> | <p>Varies based on source, but typically includes mailbox, contacts, and calendar, and for some source environments, tasks.</p> <p>For IMAP 4 source: email only</p> | <p>Varies based on source, but typically includes archives, rules, signatures, emails that exceed the message size limit, encrypted emails, and so forth.</p> |

NOTES

- Carefully consider what needs to be moved. Scope includes what is being moved and number of users.
- If moving from Exchange on-premises to the cloud, you may consider moving to a hybrid configuration.
- It's critical that the licenses are locked before mail migration begins.
- Environment remediation tasks must be completed before migration can start.
- Throughput is determined by many factors including network bandwidth and source server performance. Tests and pilot migrations are done to determine throughput.
- Review the FastTrack Service description for a complete list of what's in scope along with roles and responsibilities.

5B. Migrate files



WHAT'S INCLUDED AS OF MARCH 2018

| Destination | Source environment | |
|---|---|--|
| SharePoint Online | <ul style="list-style-type: none"> File shares (Server Message Block [SMB]) file shares on devices supporting SMB 2.0 onward) Box (Starter, Business, Enterprise) | |
| OneDrive for Business | <ul style="list-style-type: none"> File shares (SMB file shares on devices supporting SMB 2.0 onward) A single G Suite environment (Google Drive only) Box (Starter, Business, Enterprise) | |
| Source | <i>Examples of what's included</i> | <i>Examples of what's NOT included</i> |
| SharePoint Online *See FastTrack Service description for a complete list. | <ul style="list-style-type: none"> Documents File and folder structure Files under 15GB Document meta data (created date, modified date, created by, etc.) Select level of permissions* | <ul style="list-style-type: none"> Previous versions Ownership history Advanced permissions* Hidden shares Files or folders exceeding current SharePoint Online restrictions and limitations Box tags, advanced metadata, etc. |
| OneDrive for Business *See FastTrack Service description for a complete list. | <ul style="list-style-type: none"> Documents File and folder structure Files under 15GB Document meta data (created date, modified date, created by, etc.) User and group level file and folder permissions* | <ul style="list-style-type: none"> Previous versions Ownership history Advanced permissions* Selected file types (e.g., Google photos, maps, and other connected apps) Files or folders exceeding current OneDrive for Business restrictions and limitations Box tags, advanced metadata, etc. |

NOTES

- VPN access is a requirement. Place VMs close to source file share platforms.
- Rationalize what to move. It's common that an organization lets content grow ungoverned. This can impact migration velocity and user experience.
- Review your needs/requirements for file governance and security.
- Recommend migrating individuals that collaborate together at the same time.
- Start migration early. Migration throughput is based on factors such as, size, number of users, network bandwidth, to name a few.
- Review the FastTrack Service description for a complete list of what's in scope along with roles and responsibilities.

6. Adopt



KEY TASKS

Microsoft FastTrack responsibilities

- 1 Conduct Success Workshop and ensure awareness of adoption success factors (stakeholders, scenarios, awareness and communication, training, roll-out planning).
- 2 Provide best practices and guidance on both communications and training plans and activities.
- 3 Provide content to help with adoption:
 - Adoption methodology and plan templates
 - Office usage scenarios
 - Awareness kit
 - Champions Program guide
 - User training
 - Help Desk guidance

Customer responsibilities

- Build a plan that addresses success factors and focuses on communication and training.
- Execute communication and training plans to generate awareness and excitement, as well as ensure new users have the information/skills necessary to get the most out of the services purchased.
- Leverage FastTrack documentation to help with adoption methodology; build a Champions Program and/or an early adoption program; plan for Help Desk support, including training and documentation for Help Desk personnel; etc.

- 4 Check in regularly as you build your adoption approach. Build and execute your adoption methodology.

OUTCOME

Usage numbers are achieving stated goals.

NOTES AND RESOURCES

Relevant [Productivity Library](#) scenarios and resources:

- [Make data-driven decisions](#)
- [Create better work habits](#)
- [Review additional information on user adoption services](#)

FastTrack can introduce you to partners who can provide additional help (if required).

As part of core FastTrack engagements, FastTrack will provide customers with guidance, content, and best practices on how to plan for successful Microsoft 365 adoption.

Resources:

- [Microsoft 365 Adoption Guide](#)
- [FastTrack Guide for Microsoft 365](#)
- [Identify Key Stakeholders Guide](#)
- [Plan and execute early adoption program](#)
- [Build a Champion Program](#)

Appendix

FastTrack for Microsoft 365 services

FastTrack benefits include

- Service enablement guidance
- Ongoing access to FastTrack specialists (150+ seats)
- Planning workshops (remote)
- Active Directory remediation guidance
- Network, DNS, tenant and user setup guidance
- Deployment best practices and guidance
- User communications templates and guidance
- Expert guidance for supported services
- Email and endpoint security
- Email and file migration (500+ seats)

Customer responsibilities include

- Hands-on configuration
- Implementation project management
- User change management and process optimization
- Active Directory remediation
- Network configuration and bandwidth testing
- Hybrid environment configuration and deployment
- User communications and product training delivery
- LOB, third-party app remediation and biz solutions
- Email and file migration (<500 seats)

Microsoft FastTrack eligibility and supported services

Microsoft 365 (150+ seats)

Exchange Online, SharePoint Online, Microsoft Teams, Yammer, Office 365 ProPlus, OneDrive for Business, Exchange Online Protection, Skype for Business, PSTN Conferencing, Cloud PBX, PSTN Calling, Power BI Pro, Project Online, Office 365 ATP

Azure Active Directory Premium, Azure Information Protection, Intune in Azure administration experience

Windows 10, Office 365 ProPlus, App Assure, Intune MDM with System Center and MAM, Microsoft Defender ATP

Data migration (500+): Mail (Google, Notes, Exchange, Group Wise, IMAP4) and Files (Google, Box, SMB 2.0 File share)

Dynamics 365

(250+ seats deployment for Customer Engagement / 150+ seats deployment for Finance Operations)*

Sales, Customer Service, Field Service, Project Service Automation, Finance and Operations

Azure

(Onboarding >=\$60k per year; English only; limited geographies)*

Development and Test, Backup – Archiving – Disaster Recovery, Internal Business Apps / LOB

Microsoft FastTrack for Azure

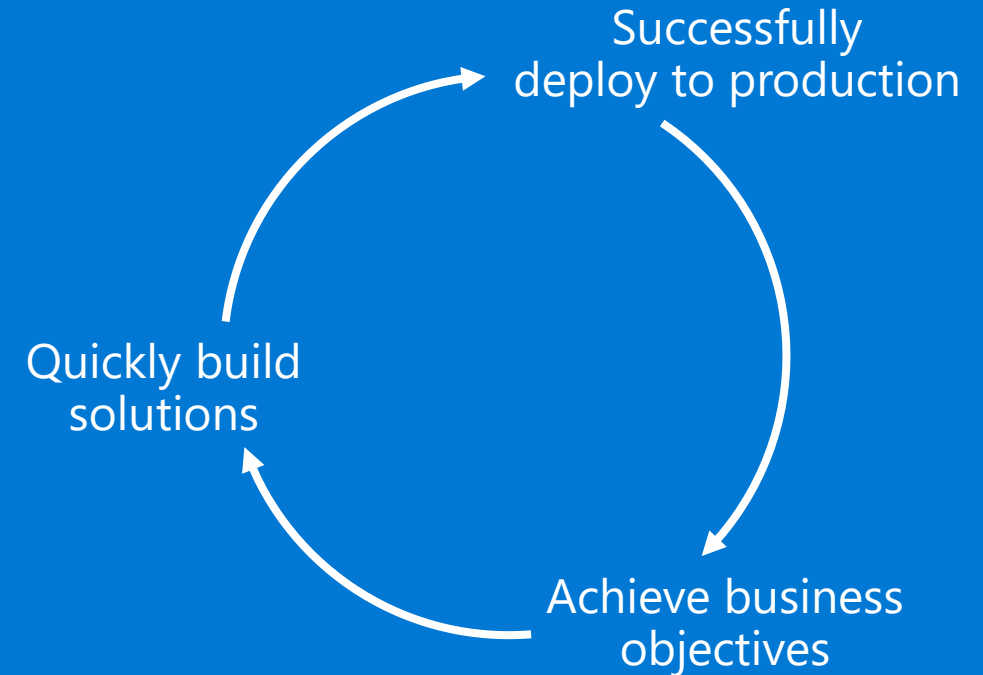
Build solutions quickly and confidently with direct assistance from Azure engineers who work hand-in-hand with partners

Benefits

- Direct assistance from Azure engineers
- Work hand-in-hand with partners
- Access best practices and tools from real customer experiences

Key phases

- **Plan** - Develop a vision and plan for customer-specific need
- **Test** - Setup Azure platform and a proof-of-concept
- **Use** - Deploy Azure solutions in production

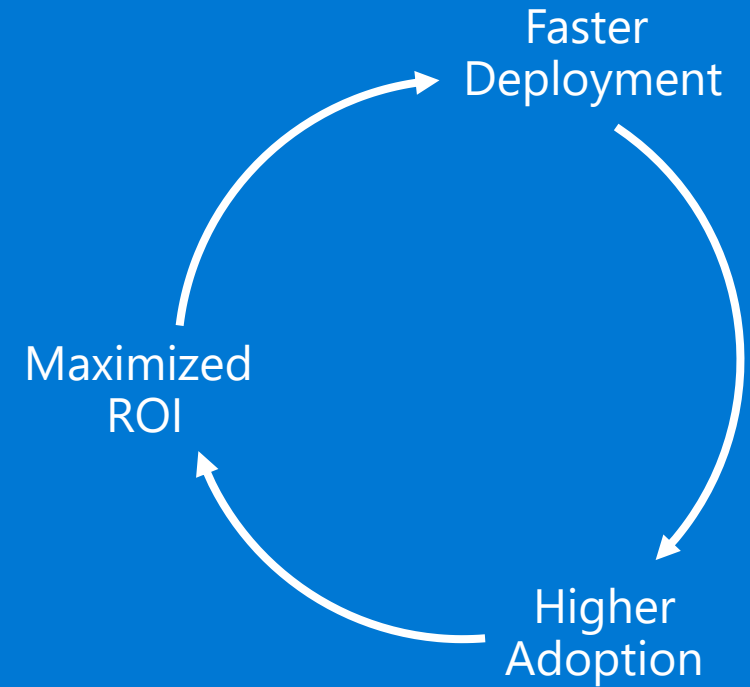


Microsoft FastTrack for Dynamics 365

Designed to help you move to Dynamics 365 smoothly and confidently, so you can realize business value faster

Benefits

- Available to all eligible customers
- Technical talks, workshops, and regular touchpoints
- Direct Microsoft engineering engagement
- Delivered remotely by time zone-based engineers in the Americas, EMEA, and APAC
- Included in subscriptions for: Dynamics 365 for Sales, Customer Service, Field Service, Project Service Automation Service, and Finance and Operations and Talent



FastTrack for Dynamics 365 services

FastTrack benefits include

- Implementation guidance, including tools and processes
- Onboarding, adoption, and migration guidance and assistance
- Architectural and technical guidance
- Customized workshops to review project milestones
- Technical talks on best practices for technical subjects
- Product roadmap and related feedback loop

Customers and partners own

- Overall program and project management
- Implementation activities, including design, development, etc.
- Data migration, security roles setup, and user trainings
- Application setup, configuration, and customization
- Product assistance and user support
- Communications and trainings to drive service adoption