



# Sample Migration

## Email Migrations to M365

**Presented to**

**Client Organization**

**Presented by**

**ITSavvy**



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**Confidentiality Statement**

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# Solution Overview

We propose the following solution to support Client Organization's technology infrastructure and end users in line with best practices. The solution consists of the following components and services.

## Kick-Off

- Upon signature of proposal and issuance of purchase order ITsavvy will assign a project manager who will be responsible for the ultimate success of the outlined project.
- Project Management, Solution Architecture & Implementation engineering will meet internally to share the details of the implementation, design & success criteria provided by Client Organization.
- Once Project Management has a thorough understanding of the proposed project, they will engage the designated internal teams within Client Organization to schedule a kick-off call where project management plans and scheduling will be determined.
- The Project Manager will provide Client Organization with timeframes for project milestones.
- Following the formation of a project management plan and client scheduling, responsibilities will be assigned to the delivery teams who will own the successful implementation of the solution outlined below.

## Plan

ITsavvy will work with the Client Organization team to determine base-line goals for project success.

Discussion and agreement of the following topics:

- ITsavvy to confirm with Client Organization that current-state and future-state application delivery information gathered during presales solution design is true and accurate
- Create a migration plan that outlines the steps, timelines, and resources required for the migration



- Prepare the Microsoft 365 tenant by creating and configuring the necessary users, groups, and mailboxes
- Client Organization & ITsavvy will agree on tools used to implement migration



## Build

ITSavvy engineer(s) will perform the migration of mailboxes to M365 platform consisting of the following:

- Use the Exchange Migration Tool (EMT) or a third-party migration tool, designated by Client Organization, to migrate the data from the Exchange environment to the Microsoft 365 tenant
- Test the migration to ensure that all data, including emails, contacts, and calendar items, have been successfully transferred

## Implement

- Configure the necessary settings, such as email routing and auto-forwarding, to ensure that email delivery is uninterrupted during the migration
- Customize the Microsoft 365 environment to match the client's specific needs and requirements
- ITSavvy will perform the final cutover and migration of mailboxes to the M365 platform

## Transition

Following the deployment of a future solution, ITSavvy will perform an additional post-installation validation survey consisting of the following:

- ITSavvy will provide Client Organization with training to ensure comfort with new productivity platform
- ITSavvy will validate a successful migration and provide Client Organization with on-going help desk support (24x7x365) through savvyGuard NOC & Helpdesk for the life of Client Organization's MSP contract



## Assumptions

- All equipment and cables will be onsite prior to technician arrival.
- Client Organization will perform a full backup of Exchange prior to implementation
- Migration does not contain public folders or shared mailboxes
- End user, endpoint support, any installation of software beyond what is outlined above will not be a part of this project
- Engineering activities beyond what is defined in this scope of work must be communicated to project manager and will be billed on a time and materials basis

## Client Responsibilities

- Client Organization will provide all information requested by ITsavvy for successful completion of this project
- Client Organization will provide ITsavvy all credentials for access as needed for the duration of the project, including full access to DNS registrar
- Client Organization will obtain all necessary MS365, Exchange O.L. and migration licensing
- Cables and connectors not specified in this proposal
- Client Organization will be responsible for any PSTs or other local information message stores



# Project Management Plan

In addition to the proposed technical solutions, ITsavvy provides detailed project management services with all client engagement activities. Project management activities will include a pro-active communications plan, a dedicated Project Manager to manage and monitor the schedule and resources, and a single point of contact for all project related activities.

## Project Initiation and Planning

- Prior to the project execution, the Project Manager will work with the client to determine and document the following:
- Requirements and activities related to project execution. These will be documented and reviewed with the client to validate the scope and assign tasks to the client and vendor resources.
- Risks related to the project and resources. A risk action plan will be developed which will include probability, potential impact to project activities, and a mitigation strategy to address all risks that come to fruition during project execution.
- Project Work Breakdown Schedule of activities based on the client's requirements and resource availability.

## Project Execution

- Project execution will commence according to the project schedule and when all prerequisite activities and/or resources are identified and in place.
- System testing will occur as part of the project execution activities and will serve as a baseline for determining additional project activities and/or project closure.

## Project Monitoring and Control

- Project monitoring will occur throughout the duration of the project, and the Project Manager will take the required action on the following items when/if they occur:



- Project delays – will be addressed with the client and assigned resources to determine the best course of action (i.e., schedule re-evaluation, resource additions, and critical path evaluation)
- Project scope control – project scope creep will be addressed with the project sponsor and a resolution will be determined to avoid schedule delays and cost overages.



## Project Closure

- Project closure will occur when all tasks and activities have been completed to the satisfaction of the client.
- Documented client acceptance of the project will be required in the form of a signed Project Acceptance and Closure document to be delivered to the client by the Project Manager upon completion.

# Investment Summary

## 1. Hardware and Software Investment (see attached quote)

| QTY | Description | Price  | Subtotal |
|-----|-------------|--------|----------|
| 1   |             | \$0.00 | \$0.00   |

Subtotal **\$0.00**

Tax **\$0.00**

**Total Hardware & Software Investment: \$0.00**

## 2. Services Investment

| Description   | Price  |
|---|--------|
| <b>Kick-Off Phase</b><br>Details provided in SOW. To be billed upon completion. | \$0.00 |
| <b>Build Phase</b><br>Details provided in SOW. To be billed upon completion.    | \$0.00 |
| <b>Deploy Phase</b><br>Details provided in SOW. To be billed upon completion.   | \$0.00 |



|   |        |
|---|--------|
| Support Phase<br>Details provided in SOW. To be billed upon completion. | \$0.00 |
|---|--------|

**Total Services Investment: \$0.00**

**3. Annual Recurring Investment (see attached quote)**

| QTY | Description | Price  | Subtotal |
|-----|-------------|--------|----------|
| 1   |             | \$0.00 | \$0.00   |

**Total Annual Recurring Investment: \$0.00**

**4. Monthly Recurring Investment (see attached quote)**

| QTY | Description | Price  | Subtotal |
|-----|-------------|--------|----------|
| 1   |             | \$0.00 | \$0.00   |

**Total Monthly Recurring Investment: \$0.00**

**Total Investment: \$0.00**



Note: Quantities, capacities and prices shown on this proposal may be adjusted each month as hardware, software and/or users are added.

This proposal along with the ITsavvy Master Services Agreement and Statement of Managed Services constitute an agreement between the parties.



# Proposal Acceptance

This proposal and all its content have been agreed to by the following representatives:

## Client Organization

## ITsavvy

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date



# Appendices

The following pages may include additional information.

