**Microsoft**

# Software Assurance

SharePoint Deployment Planning Services (SDPS)

SharePoint Deployment Planning Services provide structured consulting engagements, delivered by Microsoft qualified partners, to help you explore deployment options, reduce uncertainty, and plan your move to SharePoint Server 2013.

## Available SDPS engagements

### 1. SharePoint Deployment Planning

This structured engagement is designed to showcase how SharePoint helps enterprises share, organize, discover, build, and manage information, content, applications, sites, skills, and expertise. It is designed to help organizations discover what's new in the platform, understand how to apply the capabilities, develop a logical architecture, and create a roadmap to deployment.

#### Engagement length options
1, 3, 5, 10, or 15 days

#### Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online Planning Services Compliance Training Course on Partner University.

- Company competency requirement(s): company must have attained a Silver or Gold competency in Collaboration and Content.

- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

#### Engagement activities
Review the required activities and deliverables for this engagement.

#### Objective
Provide your customer with:

- An opportunity to meet with a SharePoint expert with deep knowledge across the platform and experience with upgrades and implementation

- An understanding of the features and capabilities of the latest release

- A definition of the business or technical challenge(s) and how SharePoint can address them

- Documentation of technical roadblocks

- A high-level solution design

- A logical architecture

### Outcome
Provide the customer with a clearer understanding of the SharePoint platform and what it can provide to their organization. Prepare the customer for a SharePoint deployment that fits their business and technical requirements.

## 2. Project and Portfolio Management (PPM) Solution Planning
This stand-alone, 5-day engagement lets you guide customers through an envisioning and planning process resulting in a clear implementation path designed to achieve the customer's business objectives. It focuses on the business and technology aspects of PPM Solution Planning methodologies, gives an overview of Project Server capabilities, and defines an implementation plan.

### Engagement length options
5 days

### Eligibility requirements

- Compliance training: at least one active consultant from your company must have completed the online Planning Services Compliance Training Course on Partner University.

- Company competency requirement(s): company must have attained a Silver or Gold competency in Project and Portfolio Management.

- Consultant competency requirement: delivering consultant must have successfully completed one or more of the technical assessments or exams required for the engagement's qualifying competency.

### Engagement activities
Review the required activities and deliverables for this engagement.

### Objective

- Provide the customer with an opportunity to meet with a PPM solution expert and engage in an in-person solution strategy session that will focus on both business and technology platforms while covering methodology, processes, and an overview of Project Server capabilities

- Target customer staff members including the Business Decision Makers (BDM), Project Management Office (PMO), and IT

- Define business objectives and how PPM will fit within the overall goals and requirements of the organization while defining solutions for overcoming primary blockers

- Facilitate a discussion on the customer's IT needs while articulating the technological pillars of the solution with the options of cloud first vs. on-premises solutions

- Articulate the desired functionality that would best meet the customer's needs such as portfolio management, project management, project collaboration, and time-sheeting

### Outcome
Provide the customer with a clearer understanding of the Microsoft Project platform and what it can provide to their organization. Prepare the customer for a Microsoft Project deployment that fits their business and technical requirements.

# Required activities and customer planning deliverable guidance

## Planning Services engagement outcome

The outcome of any engagement should always produce a *customer planning deliverable* (vision and scope plan or findings and recommendations document) that prescribes a deployment, upgrade, or migration project as the next step. This proposal should focus primarily on the logistics for *how* to deploy and less on *why*.

## Required deliverables

Each Planning Services engagement has two deliverables required for payment:

1) The customer planning deliverable
2) A submitted Planning Services Online Completion Report (OCR)

|                          | Customer planning deliverable | Online Completion Report (OCR) |
|--------------------------|:-----------------------------:|:------------------------------:|
| **Provide to the customer** | x                          |                                |
| **Submit to Microsoft**     | x                          | x                              |

The customer planning deliverable document should be provided to your customer. Additionally, it should be submitted to Microsoft, via the OCR, as proof of execution for the Planning Services engagement. Fully completed, the customer planning deliverable document should include detailed information about all required activities conducted (based on engagement length). Required activities for each engagement length are displayed in the below table. Include the plan you created and delivered to the customer based on their objectives and the overall assessment. You may adjust the outline to meet the customer's needs. The vision and recommended actionable next steps for deployment—including the actual deployment plan—must be provided. Engagements are available in 1, 3, 5, 10, or 15 days. The longer engagements allow for a deeper look at a specific technology and provide more in-depth analysis and deployment planning.

## Summary of required activities based on length of engagement

Below is a list of activities to be performed during the Planning Services engagement. The engagement length determines which activities are required. For example, a 3-day engagement must include the following activities: assessment report, envisioning workshop, design considerations, and upgrade/migration plan. Required activities descriptions can be found below.

| Required activities | 1-Day | 3-Day | 5-Day | 10-Day | 15-Day |
|---------------------|:-----:|:-----:|:-----:|:------:|:------:|
| Assessment report | x | x | x | x | x |
| Envisioning workshop | x | x | x | x | x |
| Design considerations | x | x | x | x | x |
| Deliver upgrade/migration plan | x | x | x | x | x |
| Proof of concept (POC) | | | x | x | x |
| POC findings report | | | x | x | x |

## Required activities descriptions

- **Assessment report**
  The assessment report is mainly focused on giving an overview of the engagement planning capabilities, understanding the environment, and developing a problem statement that can be addressed. Please include the following:

  1) Customer information
  2) Participant record
  3) Customer business goals
  4) Problem statements

- **Envisioning workshop**
  The envisioning workshop will facilitate both business and technology discussions covering methodology, processes, and an overview of the engagement. The desired outcome is an implementation plan covering:

  1) Customer's prioritized business objectives
  2) Desired capabilities
  3) Estimated timelines
  4) Required efforts

- **Design considerations**
  At the end of the engagement, you should be able to provide the following information—tailored to your customer's environment:

  1) Conceptual design (Provide any Visio graphs, architectural designs, etc. prepared for the engagement)
  2) Logical and physical architecture drawings

- **Plan and recommendations**
  Based on the findings during this session, provide details of the deployment plan you are recommending your customer. Please include:

  1) Findings
  2) Vision and scope
  3) Milestones
  4) Deliverable and execution timeline

- **Proof of concept (POC) findings report**
  If you delivered a proof of concept (POC), please include the following details:

  1) Describe the specific scenario addressed
  2) Detail the time to build out POC environment
  3) Define the size and scale of the POC
  4) Outline detailed findings and insights

## Learn more

**Customers**

- Software Assurance benefits administrators can visit the [Microsoft Volume Licensing Service Center](#) or [Microsoft Business Center](#) (MPSA customers) to identify current Software Assurance benefits.
- Review [Microsoft Product Terms](#) for information on eligibility criteria and current benefit program rules.
- Learn more about [Planning Services](#) and other Software Assurance benefits.
- Review the [VLSC Software Assurance guide](#) for step-by-step instructions to use Planning Services days.
- Search partner listings to [find a qualified solution provider](#) or check with their Microsoft representative.

**Partners**

- Review Planning Services [workflow](#), [policies](#), and [FAQ](#) documentation.