



MAUREEN DATA SYSTEMS

Teams Voice Rapid Deploy

STATEMENT OF WORK

PREPARED FOR:

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GOLD CERTIFIED
Partner



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MASTER SERVICES AGREEMENT

This SOW is issued under and incorporates the MASTER SERVICE AGREEMENT (the "Agreement") between Maureen Data Systems Inc. ("MDS") and <Client> Petroleum Corporation ("<Client>").

EXECUTIVE SUMMARY

<Client> is interested in migrating to Microsoft Teams Voice for calling and Meetings and is seeking assistance with the planning, design, and configuration to enhance productivity, security and modernize their voice technology landscape.

The goal of this project is to Rapidly Deploy and empower <Client> internal IT resources through detailed documentation and knowledge transfer throughout the assessment, design, and deployment of the various services outlined in this proposal. To accompany this deployment, and for operational efficiency of the on-going management of the Teams Voice deployment MDS offers a Managed Service to complement MDS Teams Voice Rapid Deploy.

After a Purchase Order is issued, this Statement of Work will be effective as of the date of signature by authorized <Client> personnel and countersigned by authorized MDS personnel. It is invalid if not made effective within 30 days of the date of issue.

POINTS OF CONTACT: MDS

Name	
Position	
Email Address	
Phone Number	

Name	
Position	
Email Address	
Phone Number	



POINTS OF CONTACT: <CLIENT>

Name	
Position	
Email Address	
Phone Number	

Name	
Position	
Email Address	
Phone Number	

STATEMENT OF WORK

During this engagement, MDS will be conducting planning, design, and implementation strategy sessions to deploy Teams Voice for up to a 25 user POC.

In addition, MDS will be conducting Microsoft Teams workshops which will either facilitate the <Client> team to manage the Teams Voice environment or optionally provide a full managed operational support of the Teams Voice Management and escalation support for up to (25) users.

To achieve the objectives listed above, MDS proposes the following project phases:

- Phase 1: Discovery, Design, and Security
- Phase 2: Teams Voice Configuration and Testing
- Phase 3: Teams Voice DID Porting
- Phase 4: Optional Teams Voice Support – MDS Managed Service

PHASE 1: TEAMS VOICE DISCOVERY, DESIGN, AND SECURITY

During this phase, MDS and <Client> will conduct a series of discovery and planning sessions centered on current telephony call flow discovery and user productivity assessment. As well as determining future state Teams telephony strategy based on Microsoft's best practices and MDS expertise and guidance.

MDS will lead <Client> in establishing the plan for conducting the Microsoft Teams voice implementation, including information architecture and call flow planning, as well as implementing strategies to employ Microsoft telephony best practices and recommendations and may seek feedback from <Client> when agreed, planned, and scheduled.

MDS activities in this phase:



MDS will conduct up to (1) 2-hour discovery meeting session(s) to cover the following:

- Overview of Microsoft Teams Voice Features and Functionality
- Identify the <Client> Project team; establish primary business objectives.
- Assess, determine opportunities for enhanced productivity, and improve usage efficiency.
- Review and determine current information architecture and organizing concepts.
- Finalize plan for the business-specific use cases identified for productivity enhancement.
- Call flow design review
- Licensing review (Domestic/International call plans, Direct Routing SBC, etc.)
- Dial plan review
- International/toll-free requirements review
- Office hours & after-hours call routing review
- Caller ID policies
- Discuss and identify Mail Enabled Security Groups for Voicemail delivery
- Discuss and identify delegation needs

<Client> activities in this phase:

- Participate in sessions
- Provide an admin account on the Office 365 tenant
- Provide existing artifacts specifying current Teams design and requirements (if any)
- Provide a list of all Project Team members and roles and required objectives
- Provide all DID's & Toll-free numbers using the MDS provided .CSV spreadsheet
- Review and validate the finalized LOA

Phase Deliverables:

- MDS to provide finalized LOA (Level of Effort) for approval by <Client>
 - LOAs contain the following details:
 - Order name: Name of your order
 - Transferred date: Transfer date issued by your current service provider.
 - Phone number details
 - Port type: Whether you're doing a full-port to transfer all your numbers or a partial-port to transfer some of your numbers.
 - Person requesting details
 - Your organization name and contact details of the person requesting the transfer.
 - Current provider's details
 - Billing telephone number (BTN)
 - Other details including the name of your current service provider, your account number, and your service address.
- Email recap summary of all working sessions:
 - Session participants
 - Overview of the working session
 - Highlight customer and/or project management requirements
 - Agenda for the next working session
 - Recording of the session



PHASE 2: TEAMS VOICE ENABLEMENT, CONFIGURATION AND TESTING

Dependencies: Phase 1

During this phase, MDS will configure Teams Voice implementing the security and configuration design produced during Phase 1 of this engagement. MDS will set up and configure Microsoft Teams and conduct a Teams Voice POC to validate the enablement process for up to (25) users.

MDS activities in this phase:

Teams Voice Configuration

- Configure up to (1) Dial plans
- Configure up to (1) Call flows
- Configure up to (20) delegates
- Text to speech and/or audio announcement
- VM to Email distribution
- M365 security group & virtual user configuration(s)
- POC DID assignment for up to (25) users and/or up to (2) Service accounts
- Configure and remotely deploy up to (25) end-user desk phones
- Configure and remotely deploy up to (1) Audio/Video conferencing room (Teams Room)
- Holiday schedule creation

Teams Voice Testing

- Monitor call quality reporting & analytics
- Remediation and support

Microsoft Teams Voice Admin Training

- Conduct a (1) 1-hour planning session to discuss the agenda for the workshop
- Conduct a (1) 2-hour session to cover the following topics:
 - Admin & reporting training
 - PowerBI reporting & template introduction
 - Call Quality Overview
 - Meetings Introduction
 - Phone System Introduction
 - Direct Routing Introduction

<Client> activities in this phase:

- Participate in sessions
- Provide a list of up to (25) pilot users
- Inbound call queue & auto-attendant testing
- Outbound dial plan testing



- Voicemail to email voice & voice to text email delivery

Phase Deliverables:

- As-built configuration Visio diagram
- Email recap summary of all working sessions:
 - Session participants
 - Overview of the working session
 - Highlight customer and/or project management requirements
 - Agenda for the next working session
 - Recording of the session

PHASE 3: TEAMS VOICE DID NUMBER PORTING

Dependencies: Phase 1 and 2

During this phase, MDS will generate and submit all necessary documents for DID (Direct Inward Dialing) number porting.

If you currently have a phone service provider or carrier and already have phone numbers for your users or services, MDS will need to create a "port order" to transfer those phone numbers to Microsoft Teams. When the numbers are ported over, MDS will assign those phone numbers to your users and services such as audio conferencing (for conference bridges), auto attendants, and call queues.

MDS activities in this phase:

DID Porting

- Port order creation
- Establish transfer date & time:
- LOA submission
- Remediation and support for (1) day after DID porting activities

<Client> activities in this phase:

- Review & sign LOA(s) created and provided by MDS.
- LOAs contain the following details and are gathered during the Discovery phase:
 - Order name: Name of your order
 - Transferred date: Transfer date issued by your current service provider.
 - Phone number details
 - Port type: Whether you're doing a full-port to transfer all your numbers or a partial-port to transfer some of your numbers.
 - Person requesting details
 - Your organization name and contact details of the person requesting the transfer.
 - Current provider's details
 - Billing telephone number (BTN)
 - Other details including the name of your current service provider, your account number, and your service address.



Phase Deliverables:

- Email recap summary of all working sessions:
 - Session participants
 - Overview of the working session
 - Highlight customer and/or project management requirements
 - Agenda for the next working session
 - Recording of the session

PHASE 4: OPTIONAL TEAMS VOICE SUPPORT – MDS MANAGED SERVICE

Dependencies: Phase 1-3



MDS 'Teams Voice Support' service provides Tier 2-3 escalation and operational support for your Teams Voice deployment adding ongoing management services for Cloud PBX and PSTN Teams Conferencing solutions which augmenting MDS's overall 'Teamwork Support' service for the Office 365 suite of services.

Teams Voice Support provides everything your organization needs to get the most out of your Teams Voice telephony solution, including proactive recommendations, visibility into the upcoming Microsoft roadmap and guidance on how to get the most from the investment you have made in Microsoft's Cloud.

Common Customer Challenges

- Cloud Voice rapid scale and secure deployment
- Ensuring 24/7 operation of critical business systems
- Validating compliance of Meetings, Chat and Voicemail
- Maintaining a consistent telephony and meeting experience for all employees
- Securing Cloud PBX and Meetings properly
- Management of user identities across multiple platforms
- Consolidate and centralize meetings and cloud telephony solutions
- Integrating Teams with existing PBX through Direct Routing
- Support different user personas, light user vs power user
- Leverage Microsoft investment for improved ROI

What's included in MDS Teams Voice Support

- Escalation support and User Management of Teams Voice and Conferencing
- Core Managed Service, reporting, monitoring, remediation, problem and incident management and Teams Voice Platform remediation
- 24x7 coverage
- Support for JML (Joiners, Movers, Leavers - on/off boarding & Provisioning Net new user DID
- Voicemail Setup
- Escalation to Premier support for break fix

Service Options

- Support & Management of Hunt Groups, Monthly changes to call routing and Auto Attendant
- Other Auxiliary Services for Teams voice:
 - Support for Direct Routing
 - Support for Holidays / Office hours & after hours call routing



- Support for Live event admin
- Call quality troubleshooting
- Will require supporting services for identity, Teamwork Support for Office 365

AREAS OUT OF SCOPE

The following activities, in addition to any not explicitly described in the above "Scope Description" section, are not included in this project.

- Troubleshooting or remediation of any issues in the current environment or existing telephony or conferencing system.
- Any services not specifically provided for in this document
- Any onsite support by MDS (all services to be performed remotely)
- Deployment of any services except for those explicitly listed within this SOW
- Troubleshooting or remediation of any issues in the current environment.
- Changes, troubleshooting, or configurations of Azure AD Connect or other hybrid identity components
- Creation, editing, or migration of any SharePoint content
- Migration of any 3rd party service not specified in this scope of work
- Configuration of any Microsoft 365 service not specified in this scope
- Migration outside of the 25 users identified
- MDS Teams Voice Support – Managed Service is excluded unless <Client> opts into the optional operational support. A separate MSP support contract will be necessary.

GENERAL ASSUMPTIONS & DEPENDENCIES

MDS has made the following assumptions while specifying the services detailed in this agreement. It is <Client>'s responsibility to identify any incorrect assumptions or take immediate action which will make any of MDS's assumptions correct.

- The location of services described in this statement of work will be as described in the Project Timeline section. Where onsite services are mutually agreed to, MDS will invoice for actual travel expenses incurred.
- For any services delivered onsite at <Client>'s location, <Client> will provide physical access, workspace, meeting spaces, and onsite internet access.
- <Client> will provide sufficient access to the environment, including all required network, security, and other access rights to all required areas of the environments prior to project commencement to allow remote access for delivery of the service. Failure to provide sufficient and timely access may impact project timeline and budget.
- <Client> requested changes that affect the activities, period of performance, or location of performance may result in increased costs.
- All systems related to this project must be maintained by <Client> and updated to the latest version required to support the technologies and activities described above.
- <Client>'s IT infrastructure is free from defects and is capable of supporting the technologies described in this Statement of Work.



- For Microsoft Online services subscriptions utilized during the course of this engagement, <Client> will name MDS as the Partner of Record.
- MDS consultants will perform all project activities during business hours, Monday through Friday, 9:00 am – 5:00 pm ET, excluding US holidays, unless otherwise agreed upon by both MDS and <Client>.
- This statement of work is valid for 30 days. MDS reserves the right to modify activities, schedule, or fees if this Statement of Work is not fully executed within 30 days of issuance.
- For estimation purposes, it has been agreed to that the client's environment have the following characteristics:
 - Only migrating up to 25 users for the Teams Voice POC
 - Each Teams voice client meets minimum system requirements found [here](#) & network bandwidth requirements found [here](#).
 - Line number porting between carriers can take up to 90 days to complete. As such, we will discuss strategies during the discovery phase.
- This statement of work is valid for 30 days. MDS reserves the right to modify activities, schedule, or fees if this Statement of Work is not fully executed within 30 days of issuance.

SOLUTION DELIVERY SERVICES

ENGAGEMENT INITIATION AND COMMUNICATION

The project will commence with a kickoff meeting/conference call between the designated MDS and <Client> points of contact. In order to complete the project within the given timeframe, it is critical that the necessary personnel from <Client> are available to participate in all relevant discussions as well as to provide any needed information about the current systems and network environment.

The objectives of the kickoff meeting are to: introduce the project team, establish expectations about the purpose of the engagement, set up the delivery approach and timelines, determine the amount of time and effort required from the participants, and confirm the expected milestones and deliverables, including the format and frequency of communications. This meeting will also serve to finalize the customer prerequisites defined in the Customer Requirements section of this SOW.

PROJECT MANAGEMENT

To ensure the successful delivery this statement of work, MDS will assign a project manager to your project. This person will be responsible for the following:

- Facilitating good communication between MDS and the client by hosting a kickoff meeting or conference all, delivering bi-weekly status reports, hosting status meetings as agreed upon with the client, scheduling meetings, and ensuring that client questions are answered in a timely manner.
- Providing any policies, practices, and standards that pertain to this project.
- Identifying, managing, and reporting on risks related to the project. The MDS project manager will maintain a risk log and will escalate risks to the client and within MDS as appropriate.
- Tracking issues that occur during the project, assigning resources to resolve them, escalating issues within MDS, third-party vendors, and the client as appropriate.
- Assigning and tracking all work within the scope of the project. The MDS project manager will create a project plan with associated resources and due dates and share it with the client.



- Managing the project's scope. Scope changes may occur. If work that is outside of the project scope is identified, the MDS project manager will perform the following steps:
 - Discuss and confirm the need for the additional work with the client.
 - Identify additional tasks and deliverables associated with the scope change.
 - Estimate the work effort associated with the additional tasks and deliverables.
 - Determine the impact on schedule and budget.
 - Draft a change order if necessary if additional resources are required and/or the project schedule will be affected.

CHANGE MANAGEMENT PROCESS

- During the project, either party may request additions, deletions, or modifications to the services described in this Statement of Work ("change request"). Such requests must be made in writing.
- For all change requests, regardless of origin, MDS will submit to <Client> a Change Request Form, which will describe the proposed change(s) to the project, including the impact of the change(s) on the project scope, schedule, fees, and expenses.
- The <Client> Project Manager, or appropriate <Client> point of contact, will be responsible for obtaining written authorization and cost approval for all change requests. Citgo must accept the proposed change(s) by signing and returning the Change Request Form. If <Client> does not sign and return the Change Request Form, the change request will be deemed rejected, and MDS will not perform the proposed change(s).
- No change to this project will be made unless it is requested and accepted in accordance with the process described in this section. MDS will have no obligation to perform or commence work in connection with any proposed change until a Change Request Form is approved and signed by the authorized personnel from both parties.

DELIVERABLES ACCEPTANCE

- Where specific deliverables are identified for distribution to the client at specified milestones described in the Scope of Work section of this document, MDS will submit completed deliverables for <Client>' review and approval. Within five business days from the date of submission, <Client> must either accept the deliverable or provide a written notice rejecting the deliverable, including a single, complete list of reason(s) for rejection. Deliverables will be deemed accepted unless <Client> provides a written rejection notice as described above. <Client>' use or partial use of a deliverable will constitute acceptance of that deliverable.
- MDS will correct problems with a deliverable that are identified in the written rejection notice, as described above, and within the scope of the deliverable, after which the deliverable will be deemed accepted. Issues that are outside the scope, and feedback provided after a deliverable has been deemed accepted, will be addressed as a potential change of scope pursuant to the Change Management processes.

CUSTOMER REQUIREMENTS

ACCESSIBILITY

<Client> ensures that MDS will have required access to the necessary network equipment during this project, subject to the rules and regulations of <Client>. If onsite presence is needed, this may require MDS personnel to be escorted while at some or all of <Client>' facilities. The inability to access the premises or networks may impede MDS' ability to meet the agreed-upon timeframe of this engagement.



MICROSOFT CPOR

For the specific Microsoft Service subscriptions utilized during this engagement, <Client> will name MDS as the Claimed Partner of Record (CPOR) for each workload.

Microsoft's CPOR program awards and recognizes partners who deliver solutions utilizing Microsoft services. This program is called "Claimed Partner of Record" (CPOR). As a certified Microsoft partner, MDS leverages this program advocate on behalf of our customers that all promotions and funding programs be made available.

The following table identifies specific workloads MDS will be associated under CPOR. Please select the workloads MDS is currently assisting with as well as any workloads you would like to be informed of for future funding, promotions, and/or transformation services.

Please fill in your tenant ID as well as domain for the workloads you wish to associate to MDS.

Partner Name	MAUREEN DATA SYSTEMS, INC.
Customer Tenant ID	<PLEASE ENTER CUSTOMER TENANT ID>
Customer Domain Name	<PLEASE ENTER CUSTOMER DOMAIN NAME>
<input checked="" type="checkbox"/> Teams Phone System	<input type="checkbox"/> Intune
<input checked="" type="checkbox"/> Teams Meetings	<input type="checkbox"/> Azure AD Premium (AADP)
<input type="checkbox"/> Teams Apps and Platform	<input type="checkbox"/> Microsoft Cloud App Security (MCAS)
<input type="checkbox"/> M365 Apps	<input type="checkbox"/> Azure Advanced Threat Protection (AATP)
<input type="checkbox"/> SharePoint Online	<input type="checkbox"/> Microsoft Information Protection
<input type="checkbox"/> Exchange Online	<input type="checkbox"/> Microsoft Defender ATP
<input type="checkbox"/> Edge (Chromium)	<input type="checkbox"/> Microsoft Information Governance
<input type="checkbox"/> Office 365 ATP*	<input type="checkbox"/> Outlook Mobile

PERFORMANCE SCHEDULE

The project timeline below reflects MDS and Ingleside Investors joint understanding for the current scope of work.

All phases are expected to be delivered consecutively and without delays, unless otherwise noted. Any changes to the project schedule that are outside of MDS's control will result in a change request to reflect the new project schedule, as well as associated adjustments to project staffing and fees.



MDS's delivery model balances onsite and remote delivery to provide customers and MDS consultants with an excellent experience. As such, throughout the course of the project, MDS will come onsite for key activities and meetings. At minimum, this typically includes onsite status meetings at least once a month for projects of a month or longer.

Activity	Week 1	Week 2	Week 3	Week 4
Teams Voice POC				
Phase 1: Teams Discovery and Design				
Phase 2: Teams Voice Enablement & Configuration				
Phase 3: Teams Voice DID Porting				
Management/Oversight				
Project Management				
Technical Oversight				

PRE-PROJECT MOBILIZATION REQUIREMENTS

To ensure adherence to the schedule agreed upon by both parties, the following activities should be completed prior to the commencement of the project:

- M365 Global Admin access

SUMMARY OF COSTS AND PAYMENT TERMS

The fee for MDS to perform the services described in this Statement of Work on a Fixed Fee basis is **\$23,000**. That amount will be invoiced to the customer in accordance with the schedule below.

Milestone or Payment Schedule	Payment
SOW Acceptance	\$11,500
Completion of Phase 2 or SOW Acceptance + 30 days	\$5,750
Completion of Phase 3 or SOW Acceptance + 60 days	\$5,750
Total:	\$23,000 USD

[MS funded example – Cloud Accelerator Program FY22]

The fee for MDS to perform the services described in this Statement of Work on a Fixed Fee basis is **\$23,000**. <CLIENT FULL> and MDS anticipates \$3,500 will be funded by Microsoft through the Cloud Accelerator Program. The remainder will be invoiced to <CLIENT FULL> in accordance with the schedule below.

Milestone	Payment
Statement of Work Acceptance	\$11,500
Completion of Phase 2 or SOW Acceptance + 30 days	\$5,750
Completion of Phase 3 or SOW Acceptance + 60 days	\$2,250
MSFT Cloud Accelerator Workshop - Modernize Communications	\$3,500



Milestone	Payment
Total	\$23,000 USD

The applicability of Microsoft funds is dependent on <CLIENT FULL> 's eligibility and <CLIENT FULL>'s cooperation with MDS on the timely completion of funding requirements. At a minimum, this includes <CLIENT FULL>'s completion of a Proof of Execution document, which may be due upon one or more milestones during the project as described in the table below. Without the completed proof of execution completed <CLIENT FULL> will be ultimately responsible for the payment of the work completed up to that point in the project engagement.

Milestone	Microsoft Funding
Completion of Phase 2 (Proof of execution 1)	\$xx,000
Completion of Phase 3 (Proof of execution 2)	\$xx,000
Total	\$xx,000

Determination of funding eligibility is at the sole discretion of Microsoft. MDS will not begin project work until funding eligibility is confirmed.



SIGNATURES

IN Witness Whereof, the parties have caused this Statement of Work to be executed and do each hereby warrant and represent that their respective signatory whose signature appears below has been and is on this date of this Statement of Work duly authorize by all necessary and appropriate corporate action to execute this Statement of Work.

Maureen Data Systems, Inc. (MDS)

Printed Name:

Signature:

Title:

Date:

<Client>

Printed Name:

Signature:

Title:

Date: