



MSD Office 365 Migration

Utah Municipal Services Division

Migration from a current M365 ~~tenet~~tenant to a new one

9.12.24

MSD Data Migration

This Proposal Statement is created on 9.4.24 by Advisor Labs, for MSD (the Client).

Company Name	Greater Salt Lake Municipal Services Division (MSD)
Proposal Name	MSD Data Migration
Effective Date	9.12.24
Company's Contact	Michael Duncan
Email	imiller@msd.utah.gov
Phone	385-468-7097
Estimated Duration of Engagement	3 months

CONTENTS

1	Points of Contact	4
2	About Client	4
3	About Advisor Labs	4
4	Task Summary.....	5
5	Task Details	6
	Discovery Phase.....	6
	Initial Consultation	6
	Inventory and Assessment	6
	Configuration Planning:.....	6
	Tenant Configuration	7
	Tenant Setup.....	7
	Exchange Online Configuration:	8
	External Sharing Configuration:.....	8
	Azure Active Directory (Entra ID) Configuration	8
	Content Migration	8
	Email Migration:.....	9
	SharePoint Migration:	9
	OneDrive Migration:.....	9
	Teams Migration	9
	Training.....	10



Technical Staff Training 10

Cutover and Support.....10

Cutover Planning:10

Execution of Cutover.....11

Post-Cutover Support:.....11

6 Assumptions & Risks 11

7 Proposed Schedule & Breakdown13

8 Estimates, Payments, & Terms.....15

9 Acceptance & Authorization17

1 Points of Contact

Project Manager	Account Manager
Trent Rowley	Adam Swaney
P: 385.501.2346	P: 602.321.3407
E: trent.rowley@advisorlabs.com	E: adam.swaney@advisorlabs.com

2 About Client

The ~~Municipal Services Division (MSD) of the State of Utah, specifically known as the~~ Greater Salt Lake Municipal Services District (MSD) ~~is a special district and political subdivision of the State of Utah that~~ provides a range of services to unincorporated ~~municipal~~ areas and certain municipalities within Salt Lake County. These services include.

- Planning & Development: Supporting community Management policies, land use, housing, infrastructure, and economic development.
- Public Works: Managing roads, stormwater and other infrastructure needs.
- Administrative Services: Handling economic development, technology and other administrative functions.

The MSD aims to ensure that these communities receive efficient and effective services similar to those ~~generally~~ provided in incorporated areas.

3 About Advisor Labs

Advisor Labs emerged from the realization that the rapidly evolving landscape of AI technology is reshaping the competitive business world. Our founders, leveraging their rich history in running a progressive technology consulting firm for nearly 10 years, along with their legacy in Artificial intelligence and Machine Learning since 2013, recognized the urgent need for businesses to embrace AI and ML to maintain their competitive edge.

At Advisor Labs, we set ourselves apart from traditional technical consulting firms with a unique dual-focus approach. We understand that the successful implementation of business and AI solutions requires not just technological expertise but also a profound understanding of each client's business. This dual subject matter approach, combining the insights of our business consultants with the technical acumen of our software and AI experts, ensures a guided path to success for our clients.

With experience across the US and even internationally, our reach and experience span various sectors. We have provided tailored solutions to mid-market and enterprise-level clients across diverse industries. Our expertise is not limited to but includes sectors such as banking, higher education, state governments,



healthcare providers, utilities, energy, and even professional sports teams. This broad spectrum of experience allows us to bring unique insights and innovative solutions to any business challenge.

4 Task Summary

MSD is requesting the help of Advisor Labs to migrate from the county's Office 365 tenant, to a tenant that is owned and operated by MSD. Advisor Labs has the experience and expertise to help government and public entities in Microsoft's Government cloud and would propose the following high-level summary of tasks to migrate MSD to their own tenant in Microsoft's GCC Office environment. The following summary will not only migrate MSD users, mailboxes, and collaborative spaces, but it will also properly configure and implement all the necessary cloud infrastructure for MSD.

1. Discovery Phase:

Advisor Labs will lead a comprehensive discovery process to identify all critical data, email accounts, SharePoint sites, and other content that needs to be migrated from the shared tenant to the new private tenant. This phase will include consultations to outline the optimal setup and configuration of MSD's new Office 365 tenant, focusing on best practices and security configurations.

2. Tenant Configuration:

Advisor Labs will configure the new Office 365 GCC (Government Community Cloud) tenant, ensuring that it meets MSD's requirements for security, compliance, and usability. This includes setting up Multi-Factor Authentication (MFA), configuring Exchange Online, establishing external sharing protocols, and optimizing SharePoint sites. Additionally, Advisor Labs will assist in defining the Azure Active Directory (Entra ID) strategy for managing user access and security.

3. Content Migration:

Advisor Labs will facilitate the migration of email accounts, SharePoint sites, OneDrive content, and meeting data to the new tenant. This process will include an initial migration followed by a delta migration to ensure a seamless transition during the cutover. Advisor Labs will supervise the use of ShareGate by MSD staff for SharePoint migrations to optimize cost efficiency.

4. Training:

Advisor Labs will provide training to MSD's technical staff on managing the new Office 365 environment, including user management, security best practices, and backup strategies. Non-technical staff will receive training on changes in their user experience, including email, SharePoint, and Teams.

5. Cutover and Support:

The final cutover will involve switching over to the new tenant, ensuring that all systems are operational with minimal downtime. Advisor Labs will provide post-cutover support to address any issues that arise and assist MSD in stabilizing their new environment.

Of note, the following items have been discussed with MSD and will be included. During the discovery phase listed above, it is expected that additional definition will be added to this list:

- M365 GCC tenant setup and optimization to Microsoft best practices.
- MFA set up, and other Security Best Practices



- Migrate exchange emails and OneDrive data for roughly 55 users.
- Migrate SharePoint sites over from one tenant to another. Approximately 10-12 SharePoint sites.
- Advise MSD on Backup Strategies, and/or 3rd party software to use for backup/recovery.
- Advise MSD on using Entra ID for Computer Logins, and general AD access.

5 Task Details

Discovery Phase

The Discovery Phase is foundational to the success of the entire project. It involves a deep dive into MSD's current Office 365 environment and the shared tenant's infrastructure, requiring a thorough understanding of how MSD has been utilizing Office 365 features and services. The objective is to ensure that nothing is overlooked during the migration, and that all potential challenges are identified early.

Initial Consultation:

Advisor Labs will conduct multiple consultation sessions with key stakeholders from MSD to gather detailed information about their current usage, pain points, and expectations for the new tenant. These consultations are not just fact-finding missions but also opportunities to discuss strategic decisions about the future configuration of MSD's Office 365 environment.

A key discussion point will be around the configuration of critical services such as Exchange Online, SharePoint, and Teams. For example, how should email retention policies be structured in the new tenant? Should external sharing be enabled for all users, or should it be restricted? These decisions require careful consideration of security implications and operational needs.

Inventory and Assessment:

Advisor Labs will perform a comprehensive inventory of all data and services within the shared tenant, focusing on identifying all user accounts, mailboxes, SharePoint sites, OneDrive files, and meeting data. This step is critical because it provides a clear picture of what needs to be migrated, ensuring that no data is left behind.

The assessment will include an analysis of SharePoint sites, which often contain complex permissions structures, custom workflows, and integrations. Each site will be reviewed to determine the best approach for migration, whether it involves a straightforward move or requires reconfiguration in the new environment.

Additionally, the inventory will help identify any deprecated or redundant content that may not need to be migrated, thereby optimizing the migration process and reducing unnecessary overhead.

Configuration Planning:

Once the inventory is complete, Advisor Labs will work closely with MSD to develop a configuration plan for the new tenant. This plan will include decisions on user roles, permissions, and security settings, all of which are crucial for maintaining the integrity and security of MSD's data.



A significant decision point during this phase will be the configuration of Multi-Factor Authentication (MFA). Advisor Labs will discuss the various MFA options available, including app-based authentication, SMS, and hardware tokens, and recommend the best solution based on MSD's security requirements.

Another key area of discussion will be around Exchange Online configuration. Decisions regarding mailbox quotas, retention policies, and spam filtering settings will be made collaboratively, with Advisor Labs providing best practice recommendations to ensure optimal security and performance.

Tenant Configuration

Setting up a new Office 365 tenant for a governmental entity like MSD involves far more than just creating accounts and assigning licenses. It requires meticulous attention to security, compliance, and governance to meet the stringent requirements of a governmental body.

Tenant Setup:

Advisor Labs will establish MSD's new Office 365 GCC tenant, ensuring it meets all compliance requirements specific to governmental organizations. This includes configuring data residency settings, ensuring that data is stored within the appropriate geographic boundaries as required by law.

A key challenge in tenant setup is ensuring that the environment is both secure and user-friendly. Advisor Labs will implement security best practices such as conditional access policies, which provide granular control over who can access the environment and under what conditions. This is especially important for protecting sensitive government data from unauthorized access.

The tenant setup will also include defining user roles and permissions, ensuring that each user has the appropriate level of access to perform their job functions without exposing sensitive data. Advisor Labs will guide MSD through decisions on how to segment data access based on roles, departments, or other criteria, balancing security with usability.

Advisor Labs leverages Microsoft's published best practices on these subjects, including the following:
<https://learn.microsoft.com/en-us/microsoft-365/community/basic-security-set-up-for-microsoft-365>

The best practices are situational, but generally, Advisor Lab's suggests the following – all of which will be discussed with MSD for their concurrence:

1. Require Multi-Factor Authentication for Global Admins
2. Designate 2 to 4 Global Admins
3. Enable Multi-Factor Authentication for All Users
4. Block Legacy Authentication Protocols
5. Enable Microsoft Defender for Office 365
6. Enable Modern Authentication
7. Configure Sign-in and User Risk Policies
8. Configure Risky User Notifications
9. Enable Audit Logging
10. Verify Mailbox Auditing is On for All Users
11. Enable Common Attachment Types Filter
12. Block Logins from Foreign Countries



13. Set Outbound Spam Notifications
14. SPF/DKIM Record Validation

Exchange Online Configuration:

The configuration of Exchange Online is one of the most critical components of the migration. Advisor Labs will implement a robust security framework, including advanced threat protection (ATP) to defend against phishing, malware, and other threats. This includes setting up policies for spam filtering, safe links, and safe attachments.

A critical decision point will be the setup of email retention and archiving policies. Advisor Labs will discuss with MSD the implications of different retention policies, balancing the need to retain records for compliance purposes with the operational overhead of storing large volumes of email data.

Additionally, Advisor Labs will configure data loss prevention (DLP) policies to prevent the unauthorized sharing of sensitive information via email. These policies will be customized to meet the specific needs of MSD, ensuring that any email containing sensitive government data is flagged or blocked as appropriate.

External Sharing Configuration:

External sharing is a feature that provides both opportunities and risks. Advisor Labs will lead a detailed discussion with MSD to determine how external sharing should be configured within the new tenant. This will involve weighing the benefits of collaboration with external partners against the potential security risks.

Advisor Labs will implement external sharing policies that are aligned with MSD's risk tolerance. This may include restricting external sharing to specific domains, requiring MFA for external users, or disabling external sharing for particularly sensitive data.

The configuration will also include monitoring and alerting mechanisms to track external sharing activities and ensure that any unauthorized access attempts are quickly identified and mitigated.

Azure Active Directory (Entra ID) Configuration:

Azure Active Directory (now known as Entra ID) plays a central role in managing user identities and access in Office 365. Advisor Labs will work with MSD to design an Entra ID strategy that supports their security and operational needs.

A key decision point will be how to integrate Entra ID with MSD's existing on-premises identity needs. MFA will be a critical component of the Entra ID configuration. Advisor Labs will help MSD define conditional access policies that enforce MFA for high-risk activities, such as accessing sensitive data or logging in from unfamiliar locations. These policies will be designed to balance security with user convenience, ensuring that security measures do not hinder productivity.

Content Migration

Content migration is often the most challenging aspect of moving to a new Office 365 tenant, especially when dealing with complex environments like MSD's. The migration process must be meticulously planned and executed to ensure that all data is transferred securely and with minimal disruption to users.



Email Migration:

The migration of email accounts from the shared tenant to the new tenant will be executed in two phases: an initial migration and a delta migration. The initial migration will involve transferring all existing mailbox data, while the delta migration will capture any changes made during the transition period, ensuring that no emails are lost.

One of the complexities in email migration is managing the cutover process, where users switch from the old tenant to the new tenant. Advisor Labs will carefully plan this cutover to minimize downtime and ensure that users can continue accessing their email without interruption.

SharePoint Migration:

SharePoint migration is particularly complex due to the potential for customizations, workflows, and integrations within existing sites. Advisor Labs will conduct a detailed analysis of each SharePoint site to determine the best migration strategy.

Advisor Labs will guide MSD staff in using the ShareGate tool to perform the migration. While ShareGate simplifies the migration process, it still requires careful planning and oversight to ensure that all content, permissions, and configurations are correctly transferred. Advisor Labs will provide hands-on support to ensure that MSD staff can manage this process effectively.

A key decision point will be the reconfiguration of SharePoint sites in the new tenant. Advisor Labs will recommend best practices for site architecture, permissions management, and data governance, helping MSD to optimize their SharePoint environment for both security and usability.

OneDrive Migration:

Migrating OneDrive content involves transferring user files from the shared tenant to the new tenant. This process must be managed carefully to ensure that no data is lost and that users can access their files as soon as the migration is complete.

Advisor Labs will work with MSD to develop a migration schedule that minimizes disruption to users. This may involve migrating data in phases, starting with the least critical users and progressing to those with the most sensitive data.

Security considerations are paramount during the OneDrive migration. Advisor Labs will implement encryption for all data transfers and ensure that file permissions are correctly maintained in the new tenant.

Teams Migration:

Migrating to Microsoft Teams involves more than just transferring data. Advisor Labs will lead a migration discovery meeting to assess the content and determine which data should be migrated to Teams.

The migration process could include transferring chat histories, files, and other relevant data to the new instance of Teams. Advisor Labs will work with MSD to ensure that the migration is as seamless as possible, with minimal disruption to users.



A key decision point will be whether to migrate all content or only selected data. Advisor Labs will provide guidance on the implications of each option, helping MSD to make an informed decision that balances the need to preserve important data with the desire to streamline the migration process.

Training

Training is a critical component of the migration process, ensuring that both technical and non-technical staff are fully prepared to operate in the new Office 365 environment. Advisor Labs will provide comprehensive training tailored to the specific needs of MSD's staff, recognizing that different user groups will have different levels of interaction with the system.

Technical Staff Training:

Understanding that MSD will be moving from an environment at the County where the County owned the top level of administration of Office 365, Advisor Labs will conduct in-depth training sessions for MSD's IT team, focusing on administration tasks that are likely new or newly relevant to MSD. Advisor Labs will work with MSD's technical team to develop this training plan.

A significant focus will be on the management of Exchange Online, including how to configure and maintain security settings such as spam filters, DLP policies, backups, and encryption. Additionally, Advisor Labs will provide training on the use of tools for monitoring and managing Office 365 services. This includes built-in Office 365 tools as well as third-party solutions that may be implemented as part of the project. The goal is to ensure that MSD's IT team has the knowledge and tools necessary to maintain a secure and compliant environment.

Another key aspect of this training will be targeted at managing the change for the end users. Advisor Lab's will help MSD's technical team understand the changes for the end users so the MSD technical team can effectively communicate and manage the support of their end users.

Advisor Labs will provide ongoing support during the training phase, allowing users to ask questions and receive real-time assistance as they become familiar with the new system. This support will continue beyond the initial training sessions to ensure that all users are comfortable and confident in using the new Office 365 environment.

Cutover and Support

The cutover process is a critical moment in the migration, where MSD transitions from the shared tenant to their new private tenant. This phase requires precise planning and execution to minimize disruption and ensure that all systems are operational with up-to-date data. The cutover will be conducted during a planned downtime window to reduce the impact on daily operations.

Cutover Planning:

Advisor Labs will work closely with MSD to develop a detailed cutover plan that outlines each step of the transition. This plan will include a timeline for the cutover, communication strategies to inform users of what to expect, and contingency measures to address any potential issues that may arise during the process.

A key decision point will be determining the optimal timing for the cutover. Advisor Labs will recommend performing the cutover over a weekend, when system usage is typically lower, allowing for a smoother transition with minimal disruption to users.

Execution of Cutover:

During the cutover, Advisor Labs will initiate a differential sync (also known as a delta migration) to ensure that the new MSD tenant contains the most up-to-date information. The differential sync will involve automated systems that compare the content initially migrated into the new MSD tenant with the content currently in the county tenant.

The differential sync will identify and migrate only the new or changed content, focusing on the “delta” between the two environments. This approach minimizes the amount of data that needs to be transferred during the cutover, reducing the overall downtime and ensuring that MSD’s users have access to the latest information as soon as the cutover is complete.

Advisor Labs will monitor the cutover process closely, ensuring that all systems are brought online in the correct sequence and that any issues are addressed immediately. This includes verifying that email routing, SharePoint access, and user permissions are functioning as expected in the new tenant.

A critical aspect of the cutover will be testing the new environment to ensure that all migrated data is accessible and intact. Advisor Labs will conduct a series of post-cutover validation tests, including verifying email flow, checking SharePoint site functionality, and ensuring that users can log in and access their data without issues.

Post-Cutover Support:

After the cutover is complete, Advisor Labs will provide ongoing support to MSD to address any issues that arise and ensure that the new environment is fully stabilized. This support will be critical during the first few days after the cutover, as users adapt to the new system and any residual issues are resolved.

Advisor Labs will also provide additional training and troubleshooting assistance as needed, helping users to quickly become familiar with the new environment and addressing any questions or concerns they may have.

To ensure long-term success, Advisor Labs will work with MSD to implement ongoing monitoring and maintenance procedures. This includes regular security audits, compliance checks, and performance monitoring to ensure that the new Office 365 environment remains secure, efficient, and aligned with MSD’s operational needs.

This detailed process explanation highlights the complexity and careful planning required for a successful migration of MSD’s Office 365 environment. Advisor Labs’ approach ensures that all critical decision points are addressed, and that the migration is conducted with a strong emphasis on security, compliance, and minimal disruption to MSD’s operations.

6 Assumptions & Risks



MSD will provide Advisor Labs with administrative access to both the shared Office 365 tenant and the new private Office 365 tenant. If this access is not provided in a timely manner, project timelines will be affected.

MSD's internal IT staff and decision-makers will be available for consultations, approvals, and coordination throughout the project timeline, ensuring that required configurations and decisions are made promptly. MSD leadership will make decisions regarding configurations, external sharing policies, and other security measures in a timely manner to avoid bottlenecks in project execution.

The data in the current Office 365 tenant (shared with the county) is accurate, complete, and accessible for migration. Any corrupt or incomplete data may result in additional troubleshooting time or potential delays.

MSD will procure all licensing required for this migration through CDW G. This includes Office 365 licensing, licensing for ShareGate, and any Office 365 backup licensing that is defined based on consultations with Advisor Labs.

MSD will provide information on any special handling requirements for sensitive data (e.g., PII or regulated data) before migration starts, to ensure that security and compliance measures can be appropriately configured.

The county tenant, which is being shared, may have its own schedules or constraints that could delay access or complicate the migration process. These constraints will impact the overall project scope, schedule, and cost.

If additional sites, users, or data are identified for migration beyond the original scope, this would require changes to the project timeline and budget.

SaaS and natively installed software products frequently push updates to their products. Advisor Labs is not in control of these updates and when updates are pushed out. There is a risk that if an update gets pushed from a software provider it could impact the work that Advisor Labs has done. Advisor Labs is not responsible for these updates. If an update causes issues with the work we are currently doing, or have previously completed, the client is responsible for engaging us on a Time and Material basis to correct those issues.

Advisor Labs assumes that the client will obtain all required executive and other internal approvals at all appropriate checkpoints. If the proper approvals are not obtained by the check point dates, cost and schedule will be impacted.

Advisor Labs assumes that all licensing, hardware, and connection information will be provided by the client in a timely manner.

Advisor Labs will provide a comprehensive schedule for the client that includes both Advisor Labs and the client's responsibilities, however Advisor Labs assumes no responsibility for schedule delays caused by the delays in the tasks assigned to the client.

7 Proposed Schedule & Breakdown

This schedule is an estimate only. It does not consider holidays, scheduling conflicts, or requirements delays on the project. A more detailed schedule will be provided within the first three weeks after receipt of the order and will be negotiated with the client for an accurate due date. The project will start within two weeks from signature. Advisor Labs will always do it's best to move faster, if required by the customer.

Week 1 & 2 Project Kickoff and Discovery Phase

Project Kickoff:

- Conduct initial meetings between Advisor Labs and MSD's leadership and IT teams.
- Establish project goals, timelines, and communication protocols.

Discovery:

- Perform a comprehensive assessment of the shared Office 365 tenant.
- Inventory all assets (emails, SharePoint, OneDrive, meeting data) to be migrated.
- Consult with MSD stakeholders to identify specific needs and challenges.
- Develop configuration recommendations for the new private tenant.
- Ensure administrative access to both the shared and private tenants is in place.

Week 3 & 4 Configuration Planning and Preparation

Configuration Planning:

- Finalize decisions on security settings, external sharing policies, user roles, and MFA setup.
- Define policies for Exchange Online, including retention, archiving, and spam filtering.
- Develop a migration strategy for SharePoint, OneDrive, and meetings data.
- Ensure necessary licenses for the new Office 365 tenant are in place.
- Procure and test migration tools (ShareGate, etc.) in preparation for migration.

Week 5 & 6 Tenant Setup and Configuration

Tenant Setup:

- Create the new Office 365 GCC tenant and configure it based on the agreed-upon security and compliance requirements.
- Set up Azure Active Directory (Entra ID) integration with on-premises AD, including MFA and conditional access policies.
- Configure Exchange Online, SharePoint, and OneDrive for the new tenant.



Pre-Migration Testing:

- Conduct small-scale migration tests to ensure that the process and tools are functioning as expected.

Week 7 through 12 Migration & Training

Initial Email Migration:

- Begin migrating email accounts from the shared tenant to the new private tenant, focusing on transferring the bulk of the mailbox data.

Security Configuration:

- Finalize advanced security configurations such as DLP policies, email filtering, and ATP setup in Exchange Online.

SharePoint Migration:

- Supervise MSD staff using ShareGate to migrate the agreed-upon SharePoint sites.
- Reconfigure SharePoint permissions and structure in the new tenant based on best practices.

OneDrive Migration:

- Migrate users' OneDrive content into the new tenant, ensuring all files are securely transferred and accessible.

Teams Migration:

- Complete the migration of selected data (chat histories, files) to Microsoft Teams.
- Configure Teams for collaboration and meetings based on MSD's needs.

Training Sessions:

- Conduct training for MSD's IT staff on managing the new Office 365 tenant, including Exchange, SharePoint, OneDrive, and security settings.
- Provide non-technical staff with training on the new user experience in Office 365, with a focus on email, SharePoint, and Teams.

Week 13 Final Prep

Delta Migration Planning:

- Plan the cutover differential sync (delta migration) to take place during the weekend, ensuring minimal downtime.

Communicate cutover plans and schedules to all stakeholders.

- Cutover Readiness:
- Verify all configurations, permissions, and migrated data in the new tenant.
- Conduct a final round of testing to ensure system readiness for cutover.

Week 14 Cutover

Delta Migration:

- Execute the delta migration during the weekend to sync all new and changed data from the shared tenant to the private tenant.

- Perform cutover activities, switching users to the new tenant and ensuring systems are live in the new environment.
- Conduct post-cutover validation tests to verify data integrity, email functionality, and access to SharePoint, OneDrive, and Teams.

Week 15+ Post Cutover Support

Post-Cutover Support:

- Provide ongoing support to MSD's IT and non-technical staff as they acclimate to the new environment.
- Resolve any issues or concerns that arise during the transition, ensuring that all systems are functioning as expected.

System Stabilization:

- Monitor system performance and security configurations to ensure stability in the new tenant.
- Conduct follow-up meetings with MSD leadership to address any remaining questions or future needs.

Ongoing Support:

- Offer four weeks of post-cutover support to ensure smooth operations.
- Address any final adjustments or issues as users continue adapting to the new system.

Final Review:

- Conduct a final project review and provide recommendations for any further optimization.
- Document the completed migration process and share lessons learned with MSD's team.

8 Estimates, Payments, & Terms

Task	Estimate (hours)	Estimate (\$)
Project Kickoff and Discovery		
Initial Consultation	4	\$1,000.00
Inventory and Assessment	6	\$1,500.00
Discovery	12	\$3,000.00
Configuration Planning	8	\$2,000.00
Tenant Config Phase:		
Tenant Setup	12	\$3,000.00
Setup Entra ID	3	\$750.00
Setup Exchange, SharePoint, Teams & OneDrive	4	\$1,000.00
Best Practices Implementation	30	\$7,500.00
Email Retention/Backup	10	\$2,500.00
Content Migration Phase:		
E-mail Migration	8	\$2,000.00
Migration Tool Setup	2	\$500.00
Supervised OneDrive Migration	2	\$500.00
Supervised SharePoint Migration	2	\$500.00



Training Phase:		
Office 365 Admin	3	\$750.00
Exchange Online	3	\$750.00
Entra ID	3	\$750.00
Cutover and Support Phase:		
Cutover Planning and Event	40	\$10,000.00
Cutover Validation	8	\$2,000.00
Cutover Support	12	\$3,000.00
Post Cutover Support	6	\$1,500.00
TOTAL <u>(not to exceed)</u>	178	\$44,500.00

The SOW/Proposal is written as a ***TIME AND MATERIALS estimated engagement***. The values given are estimates only and are based on our current understanding of systems and client expectations. Any additional time needed in addition to the estimates will be billed at our standard hourly rate of \$250. Project management meetings will be conducted as needed to assure goals and milestones are meeting the objectives of the project and to ensure the client is aware of progress and costs.

-Changes to these requirements may affect schedule and cost estimations. All such changes must be agreed to by both parties, in writing, as an addendum or new SOW/Proposal.

-Every effort will be made to include rate increases in this SOW/Proposal, however if the scope of this SOW/Proposal extends beyond one year from the Effective Date, the SOW/Proposal is subject to revision in both price and scope.

~~-Confidentiality: The information in this document shall not be duplicated, used, or disclosed in whole or in part outside the client's organization. This restriction does not limit the client's right to use information contained in this document if it is obtained from another source without restriction.~~

-This SOW/Proposal is valid for no more than **30** days from the Effective Date. If more than 30 days have passed before this SOW/Proposal is signed, the SOW/Proposal is subject to revision in both price and scope.

-This SOW/Proposal is subject to the terms and conditions of the Consulting Master Services Agreement that was provided with this statement of work.

-Advisor Labs will invoice client the 1st of each month.

- Payment is due within 30 days of invoice.

- Late payments will be assessed a 1.5% late charge monthly.



Please send payments to:
Advisor Labs LLC
201 S Main St, 20th Floor
Salt Lake City, UT 84103
385.509.0245

9 Acceptance & Authorization

The parties each acting with proper authority have executed this Statement of Work/Proposal.

Chris Weidemann

Full name

Michael Duncan

Full name

Formatted: Font color: Background 1, Text Fill

CTO

Title

Enterprise Architect

Title

Signature

Signature

Date

Date

Greater Salt Lake Municipal Services District
By Keith Zuspan, Chair, Board of Trustees

Signature

Date

4888-9824-6382, v. 2

Formatted: Font: 10 pt

Formatted: Space Before: 0 pt, Line spacing: Exactly 9 pt