1 Service Description – Future Workplace Compliance Advisory

The following section documents the requirements for the project, what is out of scope, any assumptions made to complete the design, the dependencies, and risks.

Variables	In Scope	Out of scope
Technology	Microsoft 365 Compliance Technologies, including but not limited to:	Any other technology

1.1 In Scope

Reference	Ownership	Scope Item
SOL_1	SoftwareONE	**Compliance Discovery Workshop** Onsite/Remote workshop to understand the existing compliance position, services utilised and challenges within the organisation.
SOL_2	SoftwareONE	**Tailored Playback Session and Demo Setup** SoftwareONE will take the challenges that have been identified during the discovery session and prepare a presentation on the technologies identified to help address these challenges.
SOL_3	SoftwareONE	**Results and Recommendations Playback** Workshop will be held with all interested parties to play back the slide deck created, this will present the customer with any suggestions for remediation within their tenant and highlight any general areas of compliance that they should plan into their roadmap.

2 Work Order

2.1 Future Workplace Compliance Advisory

Variables	Description

Inclusions	» A discovery workshop to discuss the current compliance landscape and challenges, including any existing customer solutions
	
	» Onboarding to and results gathering from the Cognni platform, to facilitate a better understanding of sensitive customer data – what it is, where it is stored, and who is using it
	
	» A remote assessment of the discovery workshop findings, mapped to solutions available in the Microsoft 365 compliance suite (based on the current license level). Assessment will review:
	
	  ▪ Cognni insights
	  ▪ Overview into how Microsoft 365 compliance can enhance, replace, or add to existing customer solutions
	  ▪ Information Protection
	    ▪ Sensitivity labelling
	    ▪ Data categorisation & sensitive information types
	    ▪ Data loss prevention strategies
	    ▪ Email encryption options
	    ▪ Requirements for specific encryption key arrangements with cloud service providers
	  ▪ Information Governance
	    ▪ Data retention requirements for Microsoft 365 cloud services
	    ▪ Lifecycle management of individual items and disposition workflows
	  ▪ eDiscovery and Auditing
	    ▪ Litigation holds and content searches
	    ▪ Core eDiscovery vs. Advanced eDiscovery
	    ▪ Advanced auditing requirements
	  ▪ Insider Risk Management
	    ▪ Identifying insider risk concerns
	    ▪ Managing insider threats
	    ▪ Communication compliance risks
	    ▪ Approval workflows for privileged Exchange Online administrative tasks
	    ▪ Approval workflows for data access requests from Microsoft support engineers
	
	» Consolidation of information from discovery workshop, Cognni insights, and remote assessment into a high-level presentation

	» Playback of presentation to all interested stakeholders
	» Optional presentation of costed statement of work to remediate any issues highlighted by the engagement
Exclusions	» Gathering other information than needed for the output slides and playback.
	» Any configuration changes – This is a preliminary advisory engagement alone. Implementation will be proposed in a subsequent statement of work.
Dependencies	Attendance at the workshop and throughout the engagement would be relevant for staff with the following roles / knowledge areas:
	» Availability of key technical stakeholders with vested interest in the deployment of Microsoft 365 to attend workshop and make decisions on configuration
	» Customer can grant Global Reader access to SoftwareONE consultant
	» HTTPS access to https://cognni.ai/ and all subdomains under coggni.ai
	» Customer can grant the required tenant permissions for Cognni during the onboarding process
Deliverables	» On-Premises/Remote collaborative & interactive knowledge-sharing workshop session
	» Slide Deck presentation of compliance playback and assessment results, as well as recommendations in the form of future roadmap items
	» Costed statement of work for SoftwareONE to assist with any remediation activities

2.2 Key Information & Assumptions

Variables	Description
Key Information & Assumptions	▪ The Microsoft 365 tenant exists, and Global Reader credentials will be made available for the workshops.
	▪ The required permissions have been granted to Cognni (accepted as part of the onboarding process).
	▪ The project will be delivered without interruption or suspension.
	▪ Any additions or changes to the proposed scope must be mutually agreed upon by SoftwareONE and Company Name in a formal Change Request document, outlining the proposed changes, the impact of the proposed change on pricing and schedule, and other relevant terms.
	▪ Any tasks that may need to be assigned to Company Name resources as part of any detailed resource planning will be completed on time.
	▪ Reasonable requests for functional or technical clarification will be responded to within an agreed realistic timeframe. Failure to respond during the allocated time frame could have an impact on timelines and associated cost.
	▪ Company Name accepts that our project team members will perform their duties either on site or remotely.

- Company Name accepts non-exclusive access to our project team members during the project.
- Any documentation delivered by SoftwareONE will be provided in editable formats such as Microsoft Word or Excel as applicable.
- Any Company Name nominated decision-making representative is duly empowered to make decisions as required.
- We will receive a minimum of five working days' notice of any rescheduling of work resulting from delays caused by Company Name or their contractors.
- Similarly, Company Name will receive a similar period of notice from SoftwareONE in respect of any rescheduling save any unforeseen circumstances such as sickness or emergency personal circumstances concerning the nominated consultant(s).