Valto

SharePoint New Requirements Workshop

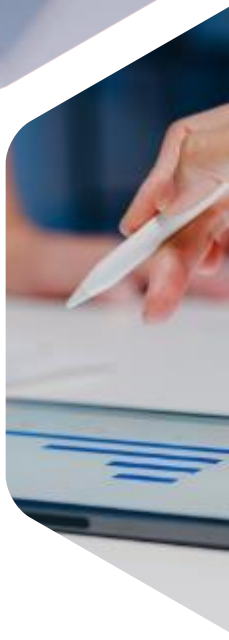
G-Cloud 15 Service Description











Valto

Valto build the intelligent workplace of the future

Powered by Microsoft

Microsoft 365 · SharePoint · Power Apps · Teams · Azure · Intune · Copilot · Viva

Valto is a Microsoft specialist committed to helping customers get more from Microsoft.

As a Microsoft Solutions Partner, we are experts in Microsoft Technologies including Modern Workplace, Microsoft 365, Azure, Business Applications, Data & AI.

One of our primary goals is to help "Change the World" by Impacting 1 million lives positively through social initiatives and working with non-profits.

Our Vision

- Best place to work
- Biggest and best projects
- Happiest Customers
- Change the World
- Best Culture
- Best Talent

MODERN WORKPLACE

DEVELOPING INTRANET, DOCUMENT MANAGEMENT AND HYBRID WAYS OF WORKING SOLUTIONS USING MICROSOFT TEAMS, SHAREPOINT, VIVA, AND OTHER MICROSOFT 365 SERVICES

MICROSOFT 365 & AZURE

ASSISTING ORGANISATIONS MANAGING DEVICES INCLUDING DESKTOPS / MOBILES AND MIGRATING TRADITIONAL SERVERS INFRASTRUCTURE TO THE AZURE PUBLIC CLOUD

BUSINESS APPLICATIONS

PROVIDING DEVELOPMENT SOLUTIONS AROUND THE MICROSOFT POWER PLATFORM INCLUDING POWER APPS, POWER BI AND POWER AUTOMATE

DATA & AI

PROVIDING AI SOLUTIONS INCLUDING FABRIC, POWER BI, AZURE PRO CODE DEVELOPMENT AND COPILOT

MANAGED SERVICES

PROVIDING MANAGED SERVICES FOR ALL THE PILLARS OUTLINED INCLUDING IT SUPPORT FOR ORGANISATIONS.

Microsoft Solutions Partners



Microsoft Solutions Partner
Modern Work
Specialist
Adoption and Change Management

Microsoft Solutions Partner in Modern Work

Modern Work Solution Partners have demonstrated the capabilities to deploy for SMB & Enterprise based on performance, skilling and customer success.

We also hold the less common Microsoft Adoption and Change Management Advanced Specialization, which, in short, means that our projects stand an extremely high chance of successful adoption.

Microsoft Solutions Partner in Digital & App Innovation

As a Solutions Partner for Digital & App Innovation we have demonstrated our broad capability to help customers build, run, and manage applications across multiple clouds, on premises, and at the edge.

Additionally, we hold the Low Code Application Development Advanced Specialization which includes Microsoft Power Apps and Microsoft Power Automate, to rapidly develop custom and flexible low-code line-of-business solutions.

Microsoft Solutions Partner
Digital & App Innovation
Azure
Specialist
Low Code Application Development

Case Studies



Chester Zoo Case Study

Reducing waste through an efficient uniform ordering app to save money.

Chester Zoo staff members needed a way to keep track of previous orders and collections and an easier way to approve or reject any uniform related requests.

Click here to read.

City of London Case Study

The City of London previously managed its gardens with pen and paper.

Their goal was simple: build a Microsoft Power App solution that would streamline garden management for London's fieldworkers and administrators alike. The solution would have to be easy to use, scalable, and securely available on employee mobile devices.

Click here to read.





North Wales Fire and Rescue Services Case Study

NWFRS enhances emergency response with secure intranet deployment.

NWFRS needed to upgrade their on-premises information systems. By leveraging existing Microsoft 365 licenses, NWFRS achieved streamlined workflows and improved communication without incurring extra costs.

Service Description

Summary

Valto's SharePoint New Requirements Workshop helps organisations capture, validate, and prioritise new SharePoint requirements. Through structured stakeholder engagement and expert facilitation, we translate business needs into clear, actionable requirements that support future enhancements, governance alignment, and improved user adoption.

Service Details

The SharePoint New Requirements Workshop is a focused engagement designed to identify and document new or evolving requirements for a new or existing SharePoint environment. Valto works with business and technical and communications stakeholders to understand current pain points, changing processes, and emerging needs.

During the workshop, we assess how SharePoint is currently used, where gaps exist, and what improvements are required to better support productivity, compliance, and collaboration. We explore content structures, permissions, automation opportunities, and integration needs to ensure requirements are realistic and aligned with Microsoft 365 capabilities.

The session is highly interactive, combining facilitated discussions, practical examples, and expert guidance. This ensures requirements are clearly defined, prioritised, and understood by all stakeholders, reducing ambiguity and future delivery risk.

Following the workshop, Valto provides a documented set of prioritised requirements with recommendations and fixed cost next steps. This output can be used to inform design, development, procurement, or internal planning activities.

Service features

- Stakeholder workshops to capture new requirements
- Review of SharePoint usage and gaps
- Functional and non-functional requirements definition
- Prioritisation of requirements by value and complexity
- Governance and compliance requirement assessment
- Information architecture and permissions considerations
- Identification of automation and integration opportunities
- Alignment with Microsoft 365 best practices
- Validation of requirements with key stakeholders
- Documented requirements and recommendations

Service benefits

- Clarifies new SharePoint requirements across stakeholders
- Reduces rework caused by unclear requirements
- Improves alignment between business and IT teams
- Supports better planning for SharePoint enhancements
- Prioritises work based on business value
- Reduces delivery risk for future changes
- Improves decision-making for digital investments
- Identifies opportunities to improve productivity
- Ensures requirements align with platform capabilities
- Provides a clear foundation for implementation

Service constraints

Access to relevant stakeholders and existing documentation is required for effective outcomes.

Workshops

Deliverable	Cost
Office 365 & SharePoint Scoping Workshop The aim of the planning and roadmap development is to fully understand the intranet and document (total storage and structure) requirements. 1 day at Valto (or 2 * half-day sessions remotely) for SharePoint Planning • Including a report with recommendations and transition plan **Agenda** • Analysis of existing file shares and systems including OneDrive, Dropbox, PC's, and File shares. • Detailed interviews with users to examine business process and further development • Overview & Roadmap for further Office 365 service enablement i.e. Teams, SharePoint Online, PowerBI etc.	Contact us
Microsoft 365 & SharePoint Scoping Session The aim of the Microsoft 365 Scoping session is to spend a day (remote) with [Company] to assist with the deployment of a bespoke Microsoft 365/SharePoint configuration. 1 day remotely for Scoping. • Including a report with recommendations and transition plan **Typical Agenda (Recorded remotely)** • Introduction • Objectives • Overview of Microsoft 365 and SharePoint • Current Process Overview • Microsoft 365 & SharePoint Requirements Gathering	Contact us
Teams Discovery Workshop The aim of the planning and roadmap development is to fully understand the requirements for Microsoft Teams and do a health check if this is currently being utilised. 1 Day remotely for Microsoft Teams Workshop/Health check • Including a report with recommendations and transition plan **Typical Agenda (Recorded remotely)**	Contact us

• Introduction • Existing Teams Setup / Situation • Ideal Teams Setup • Security • Devices • Addons • Migration • Further Services	

Microsoft 365 Strategy Workshop
 	
The aim of our Microsoft 365 Strategy Workshops is to help your organisation understand the Microsoft 365 platform and all of the products available within this. The day (1 day at Valto or 2 * half-day sessions remotely) will go through your current situation, licensing and outline the key objectives you'd like to achieve from the Microsoft 365 platform.
 	
We start the workshops with informative overviews of all of the products available (tailored to your requirements/needs). We use real examples of similar organisations that are using and deploying the features and the best practices for rolling out and configuring the platforms.
 	
As the workshops progress, we'll do a deep dive into each product and explain the functionality and settings enabling us to create a blueprint for your organisation on how these should be configured.
 	
The output of the workshop is a report that outlines the following key areas:
• Outline the overall Objectives for the Microsoft 365 Platform
• Determine the following for each product set:
  ○ Timescales
  ○ Prerequisites to Deployment
  ○ Security Considerations
  ○ Disaster Recovery Considerations
  ○ Costings
• Roadmap including Timelines and Key Dates
• Phased approach Project Fixed Pricing
 	
We've completed our strategy workshops across a number of industries including Financial, Regulated, Governments and SMES.
	Contact us

Microsoft 365 Security Assessment	Contact us

A security assessment of the Microsoft 365 Environment checking all services within the platform and covering off additional tools available in your organisation to assist with the security.
 	
1 day at [Company] (or 2 * half-day sessions remotely), the output of the workshop is a report that outlines the following key areas:
 	
• Security Assessment of all Microsoft 365 Security Services including:
  ○ Issue
  ○ Proposed Fix
  ○ Impact on Users
  ○ Effort required to resolve
  ○ Costings for Valto to resolve the issues
  ○ Licensing Impact
• Proposed Phases including timelines and costs to resolve the security holes
 	
We've completed our strategy workshops across a number of industries including Financial, Regulated, Governments and SMES.	

Microsoft 365 Intune Assessment
 	
An assessment of the Microsoft 365 Intune Environment checking all services within the platform and covering off additional tools available in your organisation to assist with MDM.
 	
1 day at [Company] (or 2 * half-day sessions remotely), the output of the workshop is a report that outlines the following key areas:
 	
• Assessment of Intune components including:
  ○ Issue
  ○ Proposed Fix
  ○ Impact on Users
  ○ Effort required to resolve
  ○ Costings for Valto to resolve the issues
  ○ Licensing Impact
• Proposed Phases including timelines and costs to resolve the configuration and recommendations.
	Contact us

Microsoft 365 Tenant to Tenant Merge/Migration The aim of the workshop is to fully scope the project requirements. Including a report with recommendations and full transition plan **Agenda** • Introduction	Contact us

• Objectives for Project • Analysis of existing environments. • Detailed interviews with client to understand requirements. • Entra • Exchange • SharePoint & Teams • On-premises Environment & Entra Connect • MS365 Tenant Configuration • Endpoint • 3rd Party Integrations i.e. Mimecast, Custom SharePoint Solutions, Entra Integrations • Azure **Pre-Requisites** • Microsoft 365 Global Reader Account - Additional Named Account(s) Required • Azure Read Role to all Subscriptions • Screensharing for AD Connect & AD Environment Overview - Additional Named Account(s) Required **Deliverables** • Report Outlining Current Environment Usage • Plan for • / Merge to another tenant • Fixed Price Costings	

Microsoft 365 File Migration Workshop
1 day remotely, the aim of this workshop is to sit down with each of the departments show them the functionality available when migrating to Microsoft 365 (SharePoint & Teams) and come up with a strategy for archiving, cleansing and migration of the files into a new structure.
• Department Demo
• Interviews with Departments
  ○ Current Folder Structure & Size
  ○ Archive Period
  ○ Key Files / Folders
  ○ Top-Level Folder Guidance
• Migration Process
  ○ Archive
	Contact us

○ Cleanse and Top-Level Folder Projects ○ Test Migration ○ Final Migration	
Egnyte Migration Workshop 1 day remotely, the aim of this workshop is to sit down with each of the departments show them the functionality available when migrating to Microsoft 365 (SharePoint & Teams) and design a strategy for archiving, cleansing and migration of the files from Egnyte into SharePoint or Teams. **Discovery & Assessment** • Review current Egnyte setup, permissions, and storage. • Gather business and compliance requirements. **SharePoint Design** • Define governance and security approach. • Plan site structure, libraries, and metadata. • Migration Strategy • Interviews with HOD's • Archive a Period	Contact us

Supplementary Services

Deliverable	Cost
Project Management Dedicated Project Management throughout the project focusing on delivering the following value add: • Project Initiation • Project Planning • Project Execution • Project Monitoring and Control	***15% of Value of Project (Excluding Tokens / Training)***

Testing Developer testing for the project focusing on delivering the following value add • Developer Test Plan Documentation • Full Testing of the Application with Tester • Internal Review Process	***10% of Value of project (Excluding Tokens / Training)***
Standard Solution Governance Dedicated governance to ensure successful, high quality delivery of the outlined project, delivering the following value add. • Regular check-in calls and milestone meetings • 2 rounds of User Acceptance Testing (UAT) inclusive of fix periods • UAT support, guidance and log Required for singular solutions/projects with a set of identified key stakeholders working towards a common set of goals and objectives.	***15% of Value of Project (Excluding Tokens / Training)***
Advanced Solution Governance Dedicated governance to ensure successful, high quality delivery of the outlined project, delivering the following value add. • Regular check-in calls and milestone meetings • 2 rounds of User Acceptance Testing (UAT) inclusive of fix periods • UAT support, guidance and log • Regular consultative client liaison meetings to support project progress • Stakeholder alignment session, determining roles and responsibilities Required for projects that include multiple solutions across a number of key stakeholders from differing teams, to ensure that all deliverables are joined up to achieve overall goals and objectives.	***20% of Value of Project (Excluding Tokens / Training)***

Project Management

The Valto Project Management fee is charged at 15% of the total project costs. This covers cost associated with any required project administration, resources and on going Project Management. The delivery tools used to ensure clients objectives are met vary based on project cost/ complexity. We have adopted a tiered based support approach, however this maybe subject to change based on level of complexity.

Stage	Project Size	< £9,999	£10,000 - £19,000	£20,000 - £29,000	£30,000 - £39,000	£40,000 +
Project Initiation	Project management fee	15%	15%	15%	15%	15%
	Generate project record	✓	✓	✓	✓	✓
	Delivery Schedule	✓	✓	✓	✓	✓
	Roles and responsibilities	✓	✓	✓	✓	✓
	Resource allocation	✓	✓	✓	✓	✓
Design and Build	Maintain Delivery Plan	✓	✓	✓	✓	✓
	Risk Management			✓	✓	✓
	BI-Weekly status report			✓	✓	✓
	BI-Weekly update call			✓	✓	✓
Test	Internal Testing/ QA	✓	✓	✓	✓	✓
Deploy	Closure Survey/ Report	✓	✓	✓	✓	✓

Azure

Identify customers with on premise servers, AWS, SQL, Remote Desktop, VMWare, SAP, etc. and propose the following options:

Deliverable	Cost
Azure Rapid Assessment Free Readiness Assessment worth $5k. This is a free assessment provided by Microsoft that will provide a report on how to migrate to Azure. This can be used in conjunction with the Azure Migration & Modernise below to move workloads to Azure for free. Product Sheet	**£0.00**
Azure Migrate & Modernise Free migration funding worth $5,000 to $50,000. This can be used to migrate away from non-Azure solutions such as server infrastructure, AWS, etc. Product Sheet	**£0.00**
Azure Credit Offer Free PoC Azure Credit Worth at least $1,200. Used for clients where they might want to trial a solution within Azure such as Data & AI, Fabric, Azure Virtual Desktop, etc. Allows for a month of Azure credit to be applied. Product Sheet – Page 2	**£0.00**
Azure Assessment - SCOUT For customers with an existing Azure Subscription (Not with us already). This enables us to do a free cost, security and utilisation report with the view of moving it over to a Valto subscription. Product Sheet	**£0.00**

Managed Services

For pricing managed services you will need a completed questionnaire from the customer and the internal pricing calculator to get the required costs: Managed Support Tiers - Pricing.xlsx

Onboarding

Product	Cost
Onboarding Setup For organisations opting for the Essential, Advanced and Advanced Security tiers, Valto require an initial onboarding session to align with the clients needs and ensure correct setup from a support perspective. This includes: • Assets scoping • New starter/leaver processes • Applications & services • Core infrastructure understanding • Initial setup of services (Monitoring onboarding)	Contact Us

Managed IT Support

Products	Essential	Advanced	Advanced Security
Remote Desktop Support	✓	✓	✓
Core Business Hours - Mon- Fri (exclude Bank Hols)	✓	✓	✓
Valto Support Portal	✓	✓	✓
Annual Reporting and Service Review	✓	✓	✓
Out of Hours – Weekends, 24X7	Optional	Optional	Optional
On-site Core Services*	Billable	Billable	✓
3rd Party Vendor Management	✓	✓	✓
Starter / Leaver Process	✓	✓	✓
Major accident Management	Billable	✓	✓

Change Management**	Billable	✓	✓
Service Request Management	Billable	✓	✓
Teams Telephony	Billable	✓	✓
Desktop Monitoring	✗	✗	✓
Desktop Patch Management	✗	✗	✓

Server Support

Products	Essential	Advanced
Server Monitoring	✓	✓
Server Patching	✓	✓
Server Backup*	✗	✓
Server Disaster Recovery*	✗	✓
On-site major incident	Billable	✓

Network Support

Products	Essential
Wireless Network	✓
Wired Networks	✓
Internet Connections	✓
Firewall	✓
On-Site services	Optional

Managed Microsoft 365

Products	Free Tier*	Essentials	Advanced	Advanced Security
Microsoft Support Management	✓	✓	✓	✓
License Management	✓	✓	✓	✓
Basic Service Health Monitoring	✓	✓	✓	✓
Annual Free Health Check	✓	✓	✓	✓
Account Manager	✗	✓	✓	✓
Monthly Reporting	✗	✓	✓	✓
Quarterly Review and updates	✗	✓	✓	✓
Annual Security Hardening	✗	✓	✓	✓
Technical Consultant for Monthly Reviews*	✗	✗	✓	✓
Intune and Endpoint Security Management*	✗	✗	✓	✓
Secure Score Management**	✗	✗	✓	✓
Proactive Security operations & Monitoring	✗	✗	✗	✓

Managed SharePoint

Products	Essentials	Advanced
Support Portal	✓	✓
Incidents of SharePoint components	✓	✓
Authorised Users	2	5
Service health monitoring	✓	✓
Customer Success Manager with quarterly reviews	✗	✓

Annual SharePoint Review	✗	✓

Managed Azure

This service focuses on a fully managed approach covering all aspects of your Azure estate.

Component	Details
SERVICE MONITORING	• Performance Monitors for Key Resources • Azure Service Health Alerts • IaaS Server Monitoring with RMM
MANAGED MAINTENANCE	• OS Patching • Azure Platform Updates
MANAGED BACKUPS	• Scheduled and Validation • Retention Planning • Monitoring
SECURITY	• Microsoft Sentinel Monitoring • Defender for Cloud Setup and Monitoring • Permission Management
TECHNICAL SUPPORT	• Respond to incident requests within SLA • Diagnose Platform Issues • Recommend Remediations
SERVICE DELIVERY MANAGEMENT	• Account Manager • Quarterly Review • Reporting
CLOUD OPTIMISATION	• Annual Review with a Technical consultant • Cost Optimisation with FinOps
Cost	**Minimum cost of £1,500 Per Month** **Then 15% of Azure Monthly Consumption** **Azure NCE Subscription provided by Valto**

Maintenance Agreements

Deliverable	Cost
Valto Maintenance Managed Service (Power Platform) Valto will provide the above Managed Service for the solution based on a monthly cost of 2.5% of the overall deployment cost (excluding Consultancy / Workshop and Training elements).	**Per Project**

• **Note:** Effort is 2.5% of value of project, excluding tokens or training.	
SharePoint Maintenance Agreement (SharePoint/Viva)	**Per Project**

Typical Timelines & Plan

Microsoft 365

These are the typical timelines for an EMS project.

Type	
Scoping and PTOR (Project Terms of Reference) 1. Scoping Remotely with Build PTOR 2. Deliver PTOR to 3. Commence Project	Typically booked **2 weeks** after receiving PO
Typical EMS Project Timelines 1. Following Acceptance of PTOR project is commenced 2. Relevant EMS Applications deployed and tested to a Pilot Group of users (up to 10) 3. User Acceptance Testing is completed amongst the Pilot Group for a period of 1 to 2 weeks and any required policies are altered and bugs fixed. 4. Project Go Live set and EMS policies deployed to All Users or another group within the organisation 5. Final UAT 2-week period in which any required bugs are resolved.	Typical timeline for deployment would be **6 weeks** from commencement of this phase to completion

SharePoint & Teams

These are the typical timelines for a SharePoint project.

Type	
Office 365 Workshop Remote / Onsite 1. Workshop to scope out requirements. 2. Report Created remotely.	Typically booked **8-10 weeks** after receiving PO
Office 365 Workshop Report Delivery 1. Report delivered electronically and reviewed by client. 2. Review meeting booked to refine and confirm design.	Report created **1 week** after the workshop
Project Readiness Phase During this phase Valto will be gathering all of the required information with Valto Support. This includes the following: • SharePoint Intranet Homepage Design • Kick Off Call • Bi-Weekly Calls • Content Generation for Required Apps and Pages • File Migration Guidance	Projects following the workshop would require a typical timeline of **8 weeks** to gather all of the required information to deploy during the project.
Typical SharePoint Build Timelines 1. Following Acceptance of Report project is commenced 2. Valto deploy the architecture design in the client environment. 3. User Acceptance Testing is completed amongst the Pilot Group for a period of 1 to 2 weeks and any required changes are altered and bugs fixed. 4. Project Go Live set & Training provided. 5. Final UAT 2-week period in which any required bugs are resolved.	Typical timeline for deployment would be **6 weeks** which begins after the Project Readiness phase.

Power Platform

Type	
Office 365 Workshop Onsite 1. Workshop to scope out requirements. 2. Report Created remotely.	Typically booked **2-3 weeks** after receiving PO
Office 365 Workshop Report Delivery 1. Report delivered electronically and reviewed by client. 2. Review meeting booked to refine and confirm design.	Report created **1 week** after the workshop
Project Planning Upon acceptance of the project once this has been signed off the project will be planned in to start with the development team. This process can take 3-6 weeks dependent on current workload.	Projects following the workshop would require a typical timeline of **3-6 weeks** to plan in before commencement.
Typical Power Apps Project Timelines 1. Following Acceptance of Report project is commenced 2. Valto deploy the architecture design in the client environment. 3. User Acceptance Testing is completed amongst the Pilot Group for a period of 1 to 2 weeks and any required changes are altered and bugs fixed. 4. Project Go Live set & Training provided. 5. Final UAT 2-week period in which any required bugs are resolved.	Typical timeline for deployment would be **4-6 weeks** from commencement of this phase to completion