Valto

# Power Bi Health Check

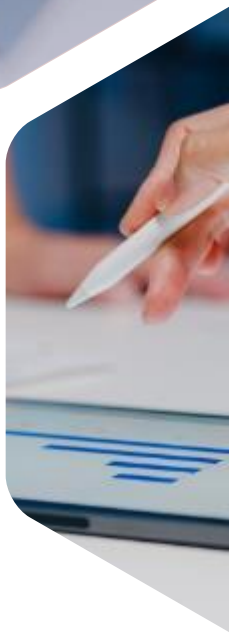
**G-Cloud 15 Service Description**











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 Power BI Health Check helps organisations assess the quality, performance, and governance of their Power BI environment. Through an objectives-led workshop and detailed assessment, we provide clear recommendations to improve reliability, security, and reporting effectiveness.

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**Service Details**
The Power BI Health Check is a structured engagement designed to evaluate an existing Power BI environment against business and reporting objectives. It begins with a workshop to understand intended outcomes, current usage, and success measures.
Following the workshop, Valto conducts a detailed assessment covering data models, report performance, security, sharing, governance, and workspace structure. We identify issues that may impact report reliability, usability, or scalability.
Our assessment combines technical review with insights into user behaviour and reporting practices. This ensures recommendations are practical, achievable, and aligned with how Power BI is used across the organisation.
Valto produces a detailed health check report outlining findings, risks, and prioritised recommendations. These can be implemented by internal teams or delivered by Valto through a fixed price engagement to support agreed objectives.

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**Service features**
- Objectives-led discovery and stakeholder workshop
- Review of Power BI reports and dashboards
- Data model and performance assessment
- Security, access, and sharing review
- Workspace and governance structure assessment
- Usage and adoption analysis
- Identification of risks and improvement opportunities
- Alignment with Power BI best practices
- Prioritised recommendations and actions
- Fixed price implementation options

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**Service benefits**
- Identifies issues impacting report performance
- Aligns Power BI usage with business objectives
- Improves report reliability and trust
- Reduces governance and security risks
- Improves user experience and adoption
- Supports informed reporting decisions
- Enables confident internal ownership
- Improves return on Power BI investment
- Highlights quick wins and longer-term improvements
- Provides clear next steps for optimisation

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**Service constraints**
The service includes assessment and recommendations only and does not include remediation unless separately agreed. Access to Power BI environments, data sources, and stakeholder input is required. Recommendations reflect findings at the time of assessment and agreed objectives.

## Data and AI Workshops

| Deliverable | Cost |
|---|---|
| **Fabric / Power BI Scoping Session**<br><br>The aim of the Power BI Scoping session is to spend a day (remote) with [Company] to assist with Power BI Implementation and Strategy Creation.<br><br>1 day remotely for Fabric / Power BI Scoping.<br><br>• Including a report with recommendations and transition plan<br><br>**Typical Agenda**<br><br>• Introduction to [Company Name]<br>• Introduction to Valto<br>• Round Table Introductions<br>• Overview of Power BI & Fabric<br><br>Dive into [Company] data and Power BI Options | Contact us |
| **Fabric / Power BI Health Check**<br><br>The aim is to review the existing application and identify any potential issues/risks with the app and provide a report with recommendations and a transition plan.<br><br>**Example Agenda**<br><br>• Review Existing Fabric Architecture<br>• Issues Resolution<br>• Security (Row Level Security, Workspace Access, SQL Endpoint Access, Admin and Security Groups)<br><br>**Fabric / Power BI Future Scoping & Roadmap**<br><br>• Identify Statement of Works to Develop Fabric / Power BI further<br>• Fixed Priced Costing<br><br>Timelines | Contact us |
| **Fabric / Power BI Strategy Workshop**<br><br>The aim of the Fabric/Power BI Strategy Workshop is to define a plan to rollout Power BI/Fabric across the organisation. The agenda is tailored for each client but typically covers:<br><br>**AM Agenda** | Contact us |

| | |
|---|---|
| • Overview of Fabric and Power BI<br>• Review Existing Architecture and Data Structure<br>• Licensing<br>• Analyse Data Source Analytics<br>• Best Practices<br>• Reporting (Data Models, Data Sets, Structure, Dax, M-Query, Development of the Reports)<br>• Issues Resolution<br>• Security (Row Level Security, Workspace Access, SQL Endpoint Access)<br>**PM Setup**<br>• What data needs to be reported on<br>• End goals with Fabric and Power BI<br>• Dataflow and Data Pipelines<br>• Data Activators<br>• Real time examples of Fabric for Data Factory and Real-Time Intelligence<br>• Q and A<br>**Output Fabric / Power BI Recommendations Report**<br>• Pricing for setting up Fabric environment<br>• Timelines<br>• Report for any additional deliverables and transition plan | |
| **AI Readiness Workshop**<br>**Welcome and Introduction**<br>• **Setting the Stage: Who are Valto?**<br>• **Introduction to AI: A Primer on Artificial Intelligence**<br>**Tech Evolution: Journey to AI**<br>• **Navigating Key Milestones: The Evolution of Technology**<br>• **Adapting to Change: How the world of business will quickly change.**<br>**Examples of AI Creativity** | Contact us |

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|---|---|
| • **Visual Creativity Unleashed: Showcasing AI Image Creation**<br>• **Lights, Camera, AI: Showcasing the Magic of AI Video Creation**<br>**Exploring AI Opportunities Across Industries**<br>• **The Power of Possibilities: Identifying Diverse AI Opportunities**<br>• **Microsoft's Insight: Statistics on the Prowess of AI (inspired by Microsoft's Predictions)**<br>• **What is the ROI from AI?**<br>**Microsoft's AI Technologies Unveiled**<br>• **Navigating the AI Toolkit: An Overview of Microsoft's AI Products**<br>• **Azure Open AI**<br>• **Copilot Microsoft 365**<br>• **SharePoint Premium (Syntex)**<br>• **AI in Valto products**<br>**Crafting an Effective AI Strategy**<br>• **Creating an AI readiness Strategy**<br>• **Strategic Imperatives: Best Practices for Developing an AI Strategy**<br>• **Understanding the Importance of Organizational AI Strategy**<br>**Navigating the Risks of AI Implementation**<br>• **Potential Risks in AI Implementation**<br>• **Security Boundaries, Deep Fakes, and Beyond: Safeguarding Your AI Journey**<br>**Real-World AI Triumphs: Case Studies**<br>• **Learning from the Pioneers: Showcasing Successful AI Implementations**<br>• **Examples from multiple industries**<br>**The AI Edge: Staying Competitive**<br>• **Why Your Competitors Are Embracing AI**<br>• **How will you stay ahead?**<br>**Interactive Session: Your Questions Answered**<br>• **Engage with Experts: Q&A Session** | |
| **Copilot & Envisioning Workshop**<br>**Introduction - Overview of Organisation and Partner** | Contact us |

| | |
|---|---|
| • Introduction to [Company Name]<br>• Introduction to Valto<br>• Round Table Introductions<br>• Objectives for the Report & Strategy<br>**Overview of Microsoft 365 AI & Copilot**<br>• Windows OS<br>• Enterprise Chat<br>• Microsoft Office<br>• Microsoft Teams<br>• Microsoft Sales<br>• Microsoft Security<br>• SharePoint Premium<br>**Preparing your Data**<br>• File Migration<br>• Security and Permissions<br>**Copilot in Action**<br>• Citations & References<br>• Sensitivity Labelling<br>• Access to Content<br>• Auditing<br>• eDiscovery<br>• Communications Compliance<br>• Viva Copilot Dashboard<br>**Governance and Structure**<br>• Licences<br>• Training & Education | |
| **AI Pro Code Development Scoping**<br>• Introduction to [Company Name]<br>• Introduction to Valto<br>• Round Table Introductions<br>• Objectives for the Report & Application of AI | Contact us |

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|---|---|
| • Current Process Overview<br>• AI Requirements Gathering | |
| **Copilot Studio Health Check Workshop**<br><br>Remote Review to assess the current implementation of Microsoft Copilot Studio and provide actionable recommendations for optimisation, governance, and scalability.<br><br>This engagement is designed for organisations already using Copilot Studio who want to ensure their solutions are secure, efficient, and aligned with best practices. Following the review, a report is produced for the organisation with the recommendations and transition plans:<br><br>**Typical Agenda**<br><br>**Solution Review**<br>• Assessment of existing Copilot(s) configuration and logic<br>• Evaluation of integration with Dataverse, Power Automate, and other systems<br>• Review of input prompts, responses, and user experience<br><br>**Governance & Management**<br>• Review of environment strategy and solution ownership<br>• Copilot lifecycle management, version control, and publishing practices<br>• Recommendations for monitoring, logging, and usage insights<br><br>**Security & Compliance**<br>• Access control and data security review<br>• Sensitivity of inputs/outputs and handling of personal or confidential data<br>• Review against Microsoft's responsible AI guidelines and governance model<br><br>**Optimisation & Scalability**<br>• Identification of performance issues or design inefficiencies<br>• Suggestions for improving response accuracy and Copilot usability<br>• Guidance for scaling to new use cases or departments | Contact us |
| **Copilot Studio Envisioning & Strategy**<br><br>1 Day Workshop to introduce, explore, and identify opportunities for Microsoft Copilot Studio within your organisation.<br><br>This interactive session is designed to educate key stakeholders on Copilot Studio capabilities, explore high-impact use cases, and identify a candidate scenario for a | Contact us |

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|---|---|
| proof-of-concept (POC). Following the workshop, a summary report is produced for the organisation with the recommendations and transition plans:<br><br>**Typical Agenda**<br><br>**Understanding & Awareness**<br><br>• Overview of Microsoft Copilot Studio capabilities<br>• Demonstrations of practical business applications<br>• Discussion of integration options with Microsoft 365, Power Platform, and custom data<br><br>**Use Case Discovery**<br><br>• Mapping of potential Copilot use cases<br>• Prioritisation of use cases by value, complexity, and readiness<br>• Opportunity Matrix – ranked list of ideas across departments<br><br>**Proof-of-Concept Scoping**<br><br>• Identification of a viable first use case<br>• High-level requirements and success criteria for POC<br>• Recommendations for technical approach and team involvement<br><br>**Next Steps & Roadmap Guidance**<br><br>• Suggested actions to move forward with a POC<br>• Outline of skills, licenses, and support required<br>• Recommendations for scaling beyond the initial pilot | |
| **Copilot Studio New App**<br><br>1 Day Workshop Engagement to design, build, and deploy a new AI-powered Copilot using Microsoft Copilot Studio.<br><br>This structured delivery approach ensures your new Copilot aligns with business needs, integrates securely with your data and systems, and is set up for long-term success. The engagement includes design workshops, build, testing, and knowledge transfer. A deployment summary is produced with the recommendations and transition plans:<br><br>**Typical Agenda**<br><br>**Requirements & Design**<br><br>• Workshop to confirm use case, scope, and business objectives<br>• Identification of required data sources and integrations<br>• User journey mapping and prompt design | Contact us |

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|---|---|
| • Compliance with Microsoft's responsible AI principles<br><br>**Copilot Build & Configuration**<br>• Creation of topics, flows, and user interaction logic<br>• Integration with internal systems via Power Automate, APIs, or Dataverse<br>• Setup of environments, security roles, and data permissions<br>• Configuration of fallbacks, escalation paths, and feedback collection<br>• Recommendations for monitoring, improvements, and future use cases | |

# Modern Workplace Workshops

| Deliverable | Cost |
| --- | --- |
| **Office 365 & SharePoint Scoping Workshop**<br><br>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<br><br>• Including a report with recommendations and transition plan<br><br>**Agenda**<br><br>• Analysis of existing file shares and systems including OneDrive, Dropbox, PC's, and File shares.<br><br>• Detailed interviews with users to examine business process and further development<br><br>• Overview & Roadmap for further Office 365 service enablement i.e. Teams, SharePoint Online, PowerBI etc. | Contact us |
| **Microsoft 365 & SharePoint Scoping Session**<br><br>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.<br><br>1 day remotely for Scoping.<br><br>• Including a report with recommendations and transition plan<br><br>**Typical Agenda (Recorded remotely)**<br><br>• Introduction<br><br>• Objectives<br><br>• Overview of Microsoft 365 and SharePoint<br><br>• Current Process Overview<br><br>• Microsoft 365 & SharePoint Requirements Gathering | Contact us |
| **Teams Discovery Workshop**<br><br>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.<br><br>1 Day remotely for Microsoft Teams Workshop/Health check<br><br>• Including a report with recommendations and transition plan<br><br>**Typical Agenda (Recorded remotely)** | Contact us |

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|---|---|
| • Introduction<br>• Existing Teams Setup / Situation<br>• Ideal Teams Setup<br>• Security<br>• Devices<br>• Addons<br>• Migration<br>• Further Services | |
| **Microsoft 365 Strategy Workshop**<br><br>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.<br><br>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.<br><br>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.<br><br>The output of the workshop is a report that outlines the following key areas:<br>• Outline the overall Objectives for the Microsoft 365 Platform<br>• Determine the following for each product set:<br>  ○ Timescales<br>  ○ Prerequisites to Deployment<br>  ○ Security Considerations<br>  ○ Disaster Recovery Considerations<br>  ○ Costings<br>• Roadmap including Timelines and Key Dates<br>• Phased approach Project Fixed Pricing<br><br>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 |

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|---|---|
| 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.<br><br>1 day at [Company] (or 2 * half-day sessions remotely), the output of the workshop is a report that outlines the following key areas:<br><br>• Security Assessment of all Microsoft 365 Security Services including:<br>  ○ Issue<br>  ○ Proposed Fix<br>  ○ Impact on Users<br>  ○ Effort required to resolve<br>  ○ Costings for Valto to resolve the issues<br>  ○ Licensing Impact<br>• Proposed Phases including timelines and costs to resolve the security holes<br><br>We've completed our strategy workshops across a number of industries including Financial, Regulated, Governments and SMES. | |
| **Microsoft 365 Intune Assessment**<br><br>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.<br><br>1 day at [Company] (or 2 * half-day sessions remotely), the output of the workshop is a report that outlines the following key areas:<br><br>• Assessment of Intune components including:<br>  ○ Issue<br>  ○ Proposed Fix<br>  ○ Impact on Users<br>  ○ Effort required to resolve<br>  ○ Costings for Valto to resolve the issues<br>  ○ Licensing Impact<br>• Proposed Phases including timelines and costs to resolve the configuration and recommendations. | Contact us |
| **Microsoft 365 Tenant to Tenant Merge/Migration**<br><br>The aim of the workshop is to fully scope the project requirements. Including a report with recommendations and full transition plan<br><br>**Agenda**<br><br>• Introduction | Contact us |

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| • Objectives for Project<br>• Analysis of existing environments.<br>• Detailed interviews with client to understand requirements.<br>• Entra<br>• Exchange<br>• SharePoint & Teams<br>• On-premises Environment & Entra Connect<br>• MS365 Tenant Configuration<br>• Endpoint<br>• 3rd Party Integrations i.e. Mimecast, Custom SharePoint Solutions, Entra Integrations<br>• Azure<br>**Pre-Requisites**<br>• Microsoft 365 Global Reader Account - Additional Named Account(s) Required<br>• Azure Read Role to all Subscriptions<br>• Screensharing for AD Connect & AD Environment Overview - Additional Named Account(s) Required<br>**Deliverables**<br>• Report Outlining Current Environment Usage<br>• Plan for<br>• / Merge to another tenant<br>• Fixed Price Costings | |
| **Microsoft 365 File Migration Workshop**<br>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.<br>• Department Demo<br>• Interviews with Departments<br>  ○ Current Folder Structure & Size<br>  ○ Archive Period<br>  ○ Key Files / Folders<br>  ○ Top-Level Folder Guidance<br>• Migration Process<br>  ○ Archive | **Contact us** |

| | |
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| ○ Cleanse and Top-Level Folder Projects<br>○ Test Migration<br>○ Final Migration | |
| **Egnyte Migration Workshop**<br>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.<br>**Discovery & Assessment**<br>• Review current Egnyte setup, permissions, and storage.<br>• Gather business and compliance requirements.<br>**SharePoint Design**<br>• Define governance and security approach.<br>• Plan site structure, libraries, and metadata.<br>• Migration Strategy<br>• Interviews with HOD's<br>• Archive a Period | Contact us |

## Supplementary Services

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

| | |
|---|---|
| **Testing**<br><br>Developer testing for the project focusing on delivering the following value add<br><br>• Developer Test Plan Documentation<br>• Full Testing of the Application with Tester<br>• Internal Review Process | ***10% of Value of project (Excluding Tokens / Training)*** |
| **Standard Solution Governance**<br><br>Dedicated governance to ensure successful, high quality delivery of the outlined project, delivering the following value add.<br><br>• Regular check-in calls and milestone meetings<br>• 2 rounds of User Acceptance Testing (UAT) inclusive of fix periods<br>• UAT support, guidance and log<br><br>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**<br><br>Dedicated governance to ensure successful, high quality delivery of the outlined project, delivering the following value add.<br><br>• Regular check-in calls and milestone meetings<br>• 2 rounds of User Acceptance Testing (UAT) inclusive of fix periods<br>• UAT support, guidance and log<br>• Regular consultative client liaison meetings to support project progress<br>• Stakeholder alignment session, determining roles and responsibilities<br><br>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**<br><br>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.<br><br>Product Sheet | **£0.00** |
| **Azure Migrate & Modernise**<br><br>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.<br><br>Product Sheet | **£0.00** |
| **Azure Credit Offer**<br><br>Free PoC Azure Credit Worth at least $1,200.<br><br>Used for clients where they might want to trial a solution within Azure such as Data & AI, Fabric, Azure Virtual Desktop, etc.<br><br>Allows for a month of Azure credit to be applied.<br><br>Product Sheet – Page 2 | **£0.00** |
| **Azure Assessment - SCOUT**<br><br>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.<br><br>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**<br><br>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:<br><br>• Assets scoping<br>• New starter/leaver processes<br>• Applications & services<br>• Core infrastructure understanding<br>• 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<br>• Azure Service Health Alerts<br>• IaaS Server Monitoring with RMM |
| **MANAGED MAINTENANCE** | • OS Patching<br>• Azure Platform Updates |
| **MANAGED BACKUPS** | • Scheduled and Validation<br>• Retention Planning<br>• Monitoring |
| **SECURITY** | • Microsoft Sentinel Monitoring<br>• Defender for Cloud Setup and Monitoring<br>• Permission Management |
| **TECHNICAL SUPPORT** | • Respond to incident requests within SLA<br>• Diagnose Platform Issues<br>• Recommend Remediations |
| **SERVICE DELIVERY MANAGEMENT** | • Account Manager<br>• Quarterly Review<br>• Reporting |
| **CLOUD OPTIMISATION** | • Annual Review with a Technical consultant<br>• Cost Optimisation with FinOps |
| **Cost** | **Minimum cost of £1,500 Per Month**<br>**Then 15% of Azure Monthly Consumption**<br>**Azure NCE Subscription provided by Valto** |

## Maintenance Agreements

| Deliverable | Cost |
|---|---|
| **Valto Maintenance Managed Service (Power Platform)**<br><br>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)**<br>1. Scoping Remotely with Build PTOR<br>2. Deliver PTOR to<br>3. Commence Project | Typically booked **2 weeks** after receiving PO |
| **Typical EMS Project Timelines**<br>1. Following Acceptance of PTOR project is commenced<br>2. Relevant EMS Applications deployed and tested to a Pilot Group of users (up to 10)<br>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.<br>4. Project Go Live set and EMS policies deployed to All Users or another group within the organisation<br>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**<br>1. Workshop to scope out requirements.<br>2. Report Created remotely. | Typically booked **8-10 weeks** after receiving PO |
| **Office 365 Workshop Report Delivery**<br>1. Report delivered electronically and reviewed by client.<br>2. Review meeting booked to refine and confirm design. | Report created **1 week** after the workshop |
| **Project Readiness Phase**<br>During this phase Valto will be gathering all of the required information with Valto Support. This includes the following:<br>• SharePoint Intranet Homepage Design<br>• Kick Off Call<br>• Bi-Weekly Calls<br>• Content Generation for Required Apps and Pages<br>• 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**<br>1. Following Acceptance of Report project is commenced<br>2. Valto deploy the architecture design in the client environment.<br>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.<br>4. Project Go Live set & Training provided.<br>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**<br>1. Workshop to scope out requirements.<br>2. Report Created remotely. | Typically booked **2-3 weeks** after receiving PO |
| **Office 365 Workshop Report Delivery**<br>1. Report delivered electronically and reviewed by client.<br>2. Review meeting booked to refine and confirm design. | Report created **1 week** after the workshop |
| **Project Planning**<br>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**<br>1. Following Acceptance of Report project is commenced<br>2. Valto deploy the architecture design in the client environment.<br>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.<br>4. Project Go Live set & Training provided.<br>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 |