



Microsoft Project & Portfolio
Management Services –
Lot 3
Service Definition

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Service Overview

QDC provides expert cloud consultancy to help organisations successfully deploy, adopt, and manage Microsoft Project and Portfolio Management (PPM) technologies. As a trusted Microsoft partner, we specialise in enabling organisations to maximise the value of Microsoft Planner, Power Platform, and Project Server. Our consultancy services include strategic guidance, tailored configuration, and hands-on support to ensure seamless implementation, integration with existing Microsoft 365 environments, and effective user adoption.

Whether you are starting your PPM journey or optimising existing solutions, QDC helps you unlock advanced capabilities such as automated workflows, custom reporting, and portfolio governance. By leveraging our expertise, your organisation can improve project visibility, enhance collaboration, and drive measurable business outcomes.

Service Features:

- **Microsoft PPM Expertise:** Support for Project, Planner, Power Platform.
- **Deployment Assistance:** Guidance for implementing Microsoft PPM technologies.
- **Configuration & Customisation:** Tailored setup aligned with organisational processes.
- **Integration Support:** Seamless integration with Microsoft 365 systems & third-party systems.
- **User Adoption:** Training and enablement for effective team use.
- **Performance Optimisation:** Monitoring and tuning for optimal system performance.
- **Security & Compliance:** Best practices for data protection compliance.
- **Power Platform Enablement:** Support for workflows, dashboards, automation.

Service Benefits:

- **Accelerated Deployment:** Reduce time implementing Microsoft PPM with expert guidance.
- **Improved Productivity:** Enable teams to work efficiently with Microsoft tools.
- **Enhanced Collaboration:** Improve communication and coordination across all projects.
- **Optimised Resource Management:** Gain visibility and control over resources.
- **Greater ROI:** Maximise the value of existing Microsoft licenses.
- **Reduced Risk:** Ensure compliance and security best practices throughout.
- **Customised Solutions:** Align technology with unique organisational processes and goals.
- **Continuous Improvement:** Adapt services as your organisation grows or changes.
- **Empowered Users:** Drive adoption through training and support for change.

Service Scope

Included Services:

Consultancy & Advisory

- Strategic guidance on Microsoft Project & Portfolio Management (PPM) adoption.
- Best practice recommendations for governance and resource management.

Deployment & Configuration

- Setup and configuration of Microsoft Planner, Project Online/Server, and Power Platform components.
- Integration with Microsoft 365 environment & third-party systems.

Customisation

- Development of workflows and automation using Power Automate.
- Creation of dashboards and reports using Power BI.

Training & Knowledge Transfer

- End-user and administrator training sessions.
- Documentation and handover of configured solutions.

Support During Engagement

- Remote or on-site consultancy days.
- Assistance with troubleshooting and optimization during the consultancy period.

Excluded Services:

- Ongoing managed service or 24/7 support (outside booked consultancy days).
- Licensing costs for Microsoft products (customer responsibility).
- Development of custom applications beyond Power Platform standard capabilities.
- Hosting or infrastructure services (covered under other G-Cloud lots).

Delivery Model:

- Consultancy delivered on a daily rate basis.
- Minimum booking: 0.25 days.
- Available remotely or on-site (subject to agreement).

Onboarding Process:

Initial Consultation:

- A discovery call to understand your organisation's objectives, current Microsoft PPM setup, and desired outcomes.

Requirements Gathering:

- Review existing processes, identify gaps, and agree on scope for consultancy days.

Engagement Planning:

- Confirm number of consultancy days, delivery method (remote/on-site), and schedule.

Access & Setup:

- Ensure required access to Microsoft 365 environment and relevant tools.

Kick-off Session:

- Introduce QDC consultants, outline deliverables, and agree on communication channels.

Offboarding Process:

Knowledge Transfer:

- Provide documentation of configurations, workflows, and any customisations implemented.

Training Wrap-Up:

- Deliver final training or Q&A sessions for administrators and end-users.

Handover:

- Transfer ownership of any developed assets (Power Automate flows, Power BI dashboards etc).

Closure Report:

- Summarise work completed, recommendations for next steps, and optimisation opportunities.

Access Removal:

- Ensure QDC access to client systems is revoked for security compliance.

Service Levels

Consultancy Delivery Hours:

- Consultancy days are delivered during standard business hours:
 - 09:00 – 17:30 (UK time), Monday to Friday, excluding public holidays.
 - Work outside these hours can be arranged by prior agreement and may incur additional charges.
- **Support Services:**
 - Ongoing support services (such as incident resolution, helpdesk, or SLA-based support) are not in scope for this service.
 - However, these can be purchased separately under a dedicated support offering if required.

Technical Requirements

- The customer must have the appropriate Microsoft licences for the technologies in scope (e.g., Microsoft 365, Project Online/Project Server, Power Platform, Power BI).
- The customer must provide QDC with the necessary access to their Microsoft 365 tenant and relevant environments to perform configuration and consultancy activities.
- Any required permissions (e.g., Global Admin or delegated admin roles) should be available for the duration of the engagement.