totara

Totara Learn

Cloud Support Services – Time and Materials projects: Service Definition

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Service Overview

Our services are specifically designed to add value to our Totara Learn Cloud-based platform. We recognise that the world of public sector learning, development and talent management is complicated, and that our customers often benefit from additional, focused engagement of our consultants on a time-and-materials basis. Our services are delivered by appropriately skilled staff, and are charged at pre-agreed volumes of time using the published rate card associated to this service.

Typical Use Cases

By nature, the use cases for our support will vary. Our engagements will start by the customer approaching us with a problem to solve.

Examples of activities we expect to be engaged to help with, under this Service include:

- Extended one-off implementation projects, where the complexity or scale of the use of the Totara Learn cloud platform is such that our core implementation services need to be enhanced, such as:
    - Additional training for wider stakeholder and administration groups
    - Enhanced site theming and user interface design, to increase adoption and uptake
    - Data transformation, de-duplication and load processes
    - Focused “pair of hands” project management or administration support to supplement the customer’s resources.
- One off advice and guidance projects, for a Totara system already in production/use. Typically our work here will be to:
    - Deliver training or re-training workshops
    - Design, create and deploy additional cloud-based software modules that solve new customer problems (noting that the ongoing hosting and maintenance of such modules does not fall into the scope of this time and materials Service)
    - Support configuration and on-platform creation tasks, such as developing new dashboards and courses to deliver particular L&D initiatives

    - Support customer's teams in HR and IT to unblock any processes or data/technical flows that are impacting the delivery of the overall Totara Learning Management System
    - Help diagnose problems caused by the customer's configuration, or inbound data interfaces
    - Provide resources for general information, advice and guidance where customer teams are not yet mature, competent or scaled to deliver services to the organisation.

This service is not a subscription nor a managed service; we expect each engagement to be time-bound, with a clear scope, and will be defined around specific tasks and/or outcomes.

Initiating an Engagement

Engagements will generally begin with the customer contacting us with a problem to solve, an opportunity, or a question that falls outside of our general SaaS service delivery. We will conduct an initial discussion to determine whether the request is within our broad capabilities, and within the customer's broad budget and timescale expectations. If we agree to continue, and the customer places an Order with us, then we will provide an estimated effort and price for discovery and scoping workshops that will result in:

- A documented set of requirements
- A documented approach to delivering the requirements
- An agreed way of working, clarifying what project management approach (waterfall, Scrum etc) we'll all work to
- Target timescales to start and complete the work, with indicative milestones where relevant, and any relevant operational deadlines called out
- Assumptions, dependencies and exclusions (out of scope elements)
- An overall effort estimate, calculated from work packages, effort per package, and rate card level for each effort element

Work is undertaken only where there is a shared understanding of what will be delivered and how effort will be consumed.

Delivery Approach

Delivery approach will be documented and agreed as an output of our engagement phase. In general, our approach will be to:

- Agree overall work packages as described in the Engagement phase above
- Create a roles/responsibilities document, with named customer-side and supplier-side team members
- Agree escalation points on both customer and supplier side
- Specify how each supplier-side team member maps to the charge-out rates on our rate card
- Break down work into small chunks that can be delivered iteratively and managed tightly without creating excessive dependencies
- Specify and agree which rate-card level is used for work planned in each work package, to give increased certainty over expected spend
- Track time (on our internal timesheeting software) per team member/role, against work packages; we track and report time in 1-hour intervals.
- Have regular check-ins including both customer and supplier teams, to communicate progress and identify risks and blockers early
- Regularly track spend against budget and expectations, and highlight and discuss variances at the earliest opportunity.
- Use appropriate project management software; we generally use Jira and Monday.com to manage projects, tough we reserve the right to use other tools as long as the don't materially change our service to you.

Billing approach

The framework, call-off terms and supplier terms and conditions, will define financial processes including invoicing in detail. In summary, we:

- Invoice regularly in arrears for work done, as tracked on our timesheet system
- On request, provide evidence of time spent that matches invoices, via reports from our timesheet system
- Confirm that work done will be by appropriately skilled resources, and be in line with our daily rates set out in our published rate card
- Agree to pause, adjust or terminate work in line with contractual terms
- Only change the resource mix after discussion with, and agreement from, the customer.

Whilst the deliverables and time spent may vary from estimates, the rate card used will be as stated in the framework agreement.

Changes to scope

Scope can be adjusted by mutual agreement, and we will decide together whether a change to scope can be handled within the existing framework Order Form, or whether a new Order is required. Changes to scope will change the effort estimate, and resource mix, and hence the estimated cost.

Exit and knowledge transfer

On completion of the engagement, we strongly recommend a handover and knowledge transfer phase. We will provide outputs and documentation (in line with Intellectual Property provisions of the framework) and training sessions as necessary. These exit processes will have an effort and cost, in line with other phases of work described earlier in this document. Our aim is to avoid any longer-term dependencies on our expertise