



Professional Services

Service Description

Document Control

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1 Service Overview

This Service Description details the Professional Services supplied to support the discovery, design, configuration, testing, migration, and optimisation of Unified Communications and Collaboration solutions. The Service applies to Microsoft Teams workloads, Direct Routing, SIP and PSTN services, Teams Rooms, Contact Centre integrations, Call Recording, Analytics, Mobility, and supporting infrastructure.

The Service can be purchased in full or as modular components. Customers may select only the phases they require, such as Discovery only, Migration only, or Integration services.

The Service aims to:

- Improve reliability of communication services
- Modernise voice and collaboration platforms
- Reduce operational overhead
- Support compliant deployment aligned to UK public-sector standards
- Enable predictable migration with minimal user disruption
- Accelerate adoption through structured training and readiness
- Deliver measurable improvements in user experience and operational efficiency

2 Service Roles and Responsibilities

The Supplier provides specialised personnel depending on requirements. All staff operate under ISO 27001-aligned processes and multi-factor authentication.

2.1 Project Manager (PM)

The Project Manager coordinates all aspects of the engagement from initiation through closure. They maintain the delivery plan, monitor progress against milestones, track risks and issues, oversee change control, and ensure dependencies remain on schedule. They act as the primary communication channel between the Customer and the Supplier, organising workshops and governance meetings, coordinating design reviews, and ensuring all deliverables progress through approval cycles in a timely manner.

2.2 Design Architect (DA)

The Design Architect provides senior technical leadership throughout the project. They validate business and technical requirements, shape the architectural direction, and answer technical queries raised during workshops and design discussions. They review and approve all High-Level and Low-Level Design documentation and ensure the solution is technically accurate, secure, scalable, and aligned to operational and compliance needs.

2.3 Delivery Engineer (DE)

The Delivery Engineer is responsible for the practical implementation of the solution. They configure all tenant, voice, routing, and integration components, prepare configuration documentation, support system and user testing, and carry out user and site migrations. They also assist with troubleshooting during all stages of delivery to ensure the final solution behaves as intended.

2.4 Additional Technical and Professional Roles

The Supplier may introduce additional roles depending on the specific needs of the Customer. These roles fall into three core groups: Development and Integration, Unified Communications, and Organisational Readiness and Service Enablement.

2.4.1 Unified Communications Roles

UC-focused roles support the architecture, design, configuration, testing, and operational readiness of Microsoft Teams and associated communication services.

- UC Architects provide deep specialist guidance across Teams Voice, Direct Routing, SIP, Teams Rooms, and multi-component collaboration environments. They ensure that every element of the UC solution aligns with technical best practice, organisational needs, and operational capability.
- UC Design Engineers prepare detailed UC design elements such as dial plans, routing tables, Auto Attendants, Call Queues, and policy mappings. Their work forms the blueprint used by Delivery Engineers during configuration.
- UC Support Engineers assist with testing, troubleshooting, and day-to-day validation of UC workloads during build and migration phases. They contribute to smoothing the transition between implementation and steady-state operations.
- Senior UC Architects may be introduced for large-scale, multi-region, or highly regulated environments where additional architectural depth or extended governance oversight is required.

2.4.2 Service Enablement and Organisational Readiness Roles

These roles support the customer's ability to adopt, operate, and sustain the implemented solution.

- The Service Manager ensures the Customer is operationally prepared for handover. They define escalation paths, incident processes, roles and responsibilities, governance checkpoints, and change management expectations. They ensure that support documentation, runbooks, and operational guides are complete before transition into BAU.
- The Change and Adoption Manager focuses on the people side of the deployment. They create communication plans, training materials, user guidance, and engagement activities to support a smooth transition to the new technology. Their role helps accelerate adoption, reduce resistance, and ensure users understand both the capabilities and expected behaviours associated with the solution.

2.4.3 Development and Integration Roles

Development and integration roles focus on extending the customer's solution, automating processes, and enabling system-to-system connectivity.

- Azure Developers create cloud-based automation and integrations using services such as Azure Functions, Logic Apps, Event Grid, and custom APIs. They work closely with the Design Architect to ensure each solution follows secure design principles and integrates cleanly with the customer's environment.
- Power Platform Developers build low-code applications, automated workflows, and custom connectors using Power Apps and Power Automate. Their work supports process improvement, data capture, and user experience enhancements across the organisation.
- Power Platform Architects provide strategic leadership for enterprise-scale low-code solutions. They define governance, environment structures, integration patterns, and security models to ensure the Customer's Power Platform estate is both manageable and scalable.
- Data Analysts support reporting and insight-led activities. They prepare datasets, build dashboards, and analyse user behaviour, performance patterns, and voice or meeting quality trends. Their work enables evidence-based decisions across operations and service improvement initiatives.

- QA and Test Engineers design and execute structured test plans to validate system behaviour before deployment. They focus on functionality, integration reliability, regression testing, and user journey validation to ensure the solution operates consistently across all intended scenarios.

2.5 Resourcing Model

The Supplier may deliver services using a blend of UK-based and near-shore personnel. All individuals, regardless of location, operate under the Supplier's ISO 27001-aligned security framework and access customer environments using secure, multi-factor authenticated methods. No customer data is transferred, stored, or processed outside the customer's Microsoft cloud environment or permitted geographic region. This model provides flexibility in resourcing while maintaining security, quality, and compliance expected by public-sector organisations.

3 Delivery Approach

The Supplier follows a structured and transparent delivery method designed to ensure predictable outcomes and high-quality technical implementation. Each phase is clearly defined and can be delivered independently or as part of an end-to-end project.

3.1 Project Kick-Off

The engagement begins with a Kick-Off meeting where scope, timelines, responsibilities, and communication expectations are confirmed. The Supplier explains the delivery methodology, outlines the data and access requirements, reviews stakeholder roles, and ensures success criteria are clearly understood by all parties. Governance and escalation paths are also agreed during this session.

3.2 Discovery and Requirements Gathering

Discovery involves a series of structured workshops where the Supplier gathers detailed information about the Customer's existing environment, business processes, operational constraints, and user needs. This phase covers areas such as network readiness, SBC topology, identity and access controls, numbering and routing requirements, licensing dependencies, Teams policies, meeting and room configurations, and any integration points with Contact Centre, Call Recording, Analytics, CRM, or Mobility platforms.

The Supplier reviews all information to validate assumptions and identify any gaps, risks, or dependencies that may affect later design or implementation work. The outputs from Discovery provide the foundation for accurate solution design.

3.3 Solution Design

Using the findings from Discovery, the Supplier produces High-Level and Low-Level Design documentation that describes the target architecture and operational model. These documents define all technical components including routing behaviour, dial plans, media paths, call flows, Teams policies, Rooms configuration, and integration logic. They also outline security requirements, identity considerations, support processes, and governance models. All designs are reviewed internally by the Supplier before being shared with the Customer for formal approval.

3.4 Configuration

Following design approval, the Supplier configures the solution in accordance with the agreed specifications. This work may involve tenant updates, SBC integration, voice routing configuration, policy alignment, device onboarding, and the implementation of integrations

with systems such as Contact Centre, Recording, or Analytics platforms. Configuration activities are documented and reviewed regularly to ensure alignment with the design.

3.5 Testing

Testing begins with system-level validation where routing, features, and integrations are confirmed to behave correctly. Integration testing follows for components dependent on third-party or external systems. User Acceptance Testing is then completed by the Customer based on pre-agreed scenarios, with the Supplier supporting troubleshooting and retesting. The aim of this phase is to ensure users can rely on expected functionality before migration.

3.6 Migration

The Supplier coordinates all migration activities including user preparation, schedule planning, pre-migration checks, number porting, and cutover events. Effort is made to ensure minimal disruption to users, with post-migration validation carried out for each site or user group. Hypercare support is provided for one week per migrated site, limited to one hour per day, to ensure early issues are resolved promptly.

3.7 Support Onboarding

Before the project transitions into operational support, the Supplier conducts an onboarding session with the Customer's operational teams. This session reviews incident processes, escalation paths, monitoring dashboards, support runbooks, and configuration documentation. Knowledge-transfer is completed to ensure the Customer can operate the platform confidently.

3.8 Project Closure

The engagement concludes with a closure meeting where deliverables are confirmed, lessons learned are captured, and the Customer receives all final documentation.

4 Integration and Development Services

The Supplier provides advanced integration and application development capabilities that enable customers to extend their collaboration platform, automate business processes, and link systems together. These services support Power Platform-based solutions, Azure integrations, custom APIs, Copilot extensions, workflow automation, and data analytics.

4.1 Integration and Development Methodology

The Supplier follows a nine-stage framework for integration and development. The process begins with understanding the Customer's goals and identifying the use cases that provide the most value. Feasibility and ROI are assessed to ensure the solution is viable and proportionate. All AI-based or automated elements are reviewed against responsible and secure AI principles to ensure compliance and ethical operation.

A detailed design is then produced covering functional behaviour, architecture, data flows, authentication, error handling, and operational monitoring. Development proceeds using an iterative approach to reduce risk and incorporate feedback early. Deployment into production follows a controlled process including verification testing and rollback planning.

After deployment, the Supplier facilitates onboarding and adoption to ensure the solution can be used effectively. Performance is monitored as part of a continuous improvement approach.

4.2 Supported Integration Areas

The Supplier supports integrations across Microsoft Teams and M365 APIs, Power Platform services, Copilot Studio, Azure Functions, Logic Apps, Event Grid, and common Contact Centre, CRM, Call Recording, and Analytics platforms. Middleware, custom APIs, and data-driven reporting frameworks are also supported.

5 Service Onboarding and Exit Management

Service onboarding introduces the Customer to the delivery approach, governance structure, communication channels, and documentation that support the service. During onboarding, the Supplier explains the operational processes, outlines the access and data requirements, and delivers any initial knowledge-transfer sessions required to allow the Customer's teams to engage confidently with the service. Training materials and user-facing documentation can be adapted to accessibility needs and delivered in a variety of formats to support different user groups.

Exit management ensures that the Customer remains fully in control of their data and configuration at the end of the engagement or contract term. As part of the offboarding process, the Supplier provides all configuration documentation, runbooks, support materials, and handover instructions required to allow the Customer—or a successor supplier—to continue the service without interruption. Data export support is provided where appropriate, and all data remains under Customer ownership. The Supplier does not create lock-in; all assets required to operate the solution are transferred to the Customer at exit.

6 Service Performance and Commercial Model

Service performance is supported through structured project cadence, clear communication, and responsive engagement during delivery. The Supplier responds to project queries within agreed service hours and completes document reviews within five working days unless another timeframe is mutually agreed. Regular updates are shared through planned project meetings and status reports to maintain transparency and ensure alignment across stakeholders.

The commercial model is based on published hourly rates for each role involved in the service. The service is consumption-based unless a fixed-price engagement is agreed through a call-off contract. Where work is required outside standard business hours, the Supplier applies pre-defined multipliers. Travel expenses are charged at cost when onsite attendance is requested. This model provides clarity, flexibility, and predictable budgeting for public-sector organisations

7 Service Governance, Responsibilities, Security, and Legal Framework

Service boundaries define what is and is not included within the engagement. The Supplier does not perform Customer-network changes, purchase hardware, supply licences, or deliver custom development outside the agreed scope. Support for non-Microsoft systems is not included unless explicitly stated. Any activities requiring elevated privileges must be granted by the Customer.

Security and data handling follow ISO 27001-aligned processes. All personnel use multi-factor authentication and operate under strict access controls. Customer data is never stored or processed outside of the Customer-controlled Microsoft cloud environment or beyond the permitted UK/EU regions unless the Customer explicitly approves such arrangements. AI components follow responsible and secure AI principles. This ensures alignment with UK public-sector expectations for governance, data protection, and operational integrity.

Customers have specific responsibilities that enable successful delivery, including providing required access, data, and documentation, designating appropriate stakeholders, completing UAT and migration sign-off, and managing internal system changes where required. Deliverable approvals should be completed within the agreed timelines to avoid delays.



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