

RecordPoint – Support and configuration services (G-Cloud 15)

Contents

Summary.....	3
Services Overview.....	4
Pilot services.....	4
Classification Intelligence configuration services.....	4
Health Check Project.....	5
Physical Records Migration Planning and Onboarding Project.....	6
General Consulting Project	6
Wave Planning and Onboarding.....	6
Maturity Assessment and Roadmap Project	7
RecordPoint Training.....	8
RecordPoint Extended Onboarding Services	8

Notice

This document contains confidential and trade secret information of RecordPoint Software (“RPS”). RecordPoint Software has prepared this document for use solely with RecordPoint. Any other use or disclosure of the information herein is prohibited, and the information may not be reproduced, copied, or used in whole or in part without the prior written approval of RPS.

Summary

RecordPoint is an industry leading cloud-based information governance platform.

Built to manage content no matter where it lives, RecordPoint provides seamless automation, policy control, analytics and insights over content that resides in both cloud-based services (such as SharePoint Online, Exchange Online, Workday, Salesforce, etc) as well as on-premises repositories like network drives, SharePoint on premises, legacy document and records systems, etc.

To ensure that customers maximise the benefit of their investment in the platform and minimise the time to value, RecordPoint provides a range of configuration, support and training services.

This Service Description describes the key support and configuration services that a customer can choose to procure under the G-Cloud framework.

All services listed here are charged at a daily rate. For information on the actual costs associated with each of these services, please see the pricing document.

Services Overview

Pilot services

A Pilot project supports you in evaluating the RecordPoint Platform against your organization's specific use cases. The target is to get an idea of how RecordPoint delivers against those use cases to bring you to a production ready state with a limited amount of content for a defined set of standard connectors. It helps demonstrate a quick return on investment with minimal cost and provides you with a deep understanding of the platform and how to further expand usage and value.

The high-level objectives for a pilot can include:

- Deploy a production ready RecordPoint tenant;
- Assist in configuring the solution to meet initial needs for in scope connector(s);
- Ensure that key in-house team members have been trained on the administration and daily use of the platform;
- Enable the extension of the solution across other content sources following the completion of the pilot program;
- Evaluating the RecordPoint Platform against specific use cases defined by your organization; and
- Help prime your internal project team with knowledge required to successfully rollout the RecordPoint platform to your organization.

A pilot project includes the following high-level activities:

- Definition of business outcomes for the pilot
- Provisioning of a test and production tenant
- Provisioning and registration meeting
- Project Kick-off
- Content source review workshop
- RecordPoint 101 education session
- Prepare & import File Plan and Retention schedule
- Design and configure metadata rules for records classification
- Classification Intelligence Experiments (If in scope)
- Support Testing
- Administration Training (2 sessions)
- Deployment to production

A RecordPoint Pilot is estimated at 12 days, including one standard connector. If Classification Intelligence is included in scope a pilot project is 15 days for one standard connector and two CI Experiments. Additional standard and custom connectors may incur further costs to be agreed.

Classification Intelligence configuration services

If Classification Intelligence (CI) is not implemented as part of a pilot project, it can be implemented independently for existing customers of RecordPoint. A CI project supports the customer in implementing CI to a production ready state in their existing RecordPoint tenant. The success criteria for a CI project are:

- Demonstrate that RecordPoint through the implementation of the Classification Intelligence module delivers automated, in-place management and compliance through a single, federated platform;
- Improve records and privacy compliance with minimal impact to the end user or disruption to existing business processes; and
- Enhance the organisation's ability to discover information.

A CI Project includes the following high-level activities:

- Project Planning and kick-off
- Review datasets for Training
- Classification Intelligence 101 Session
- Ingest and classify initial datasets
- Perform Experiment #1
- Evaluate Results
- Perform Experiment #2
- Review findings with Customer
- Deploy to production

A CI project is estimated at 6 days based on two experiments.

Health Check Project

The Health Check is designed to provide a comprehensive review of your RecordPoint implementation. Through consultation with key stakeholders, benchmarking of current program maturity, understanding of current usage patterns and future state requirements, RecordPoint will, based on information provided, produce both technical and functional recommendations, along with actionable next steps outlined to help you achieve your future state requirements.

A health check report is provided to customers which includes the recommendations and actionable next steps to meet the future state requirements.

Benefits of a health check including:

- Ensuring customers have maximized their investment in RecordPoint
- Rules audit
- Resolution of any roadblocks a customer may be experiencing
- Identification of additional potential source systems and expansion of existing content sources
- Opportunities to further leverage the platform to address needs around privacy obligations or other risk factors within the business
- Customer receives a prioritised workplan with a series of recommendations for improving their use of RecordPoint

The effort required for a RecordPoint health check is aligned to their maturity, complexity, and subscription level:

- Starter Subscription – 5 days
- Standard Subscription – 7 days
- Enterprise Subscription – 10 days
- Where custom or premium connectors have been implemented, allow an additional 1 day per connector.

Physical Records Migration Planning and Onboarding Project

While the RecordPoint Platform is designed for in-place records management for electronic records, we do support your physical records management needs. This can include the need for Physical Records Migrations from legacy ECM solutions. Migration is complex and RecordPoint's methodology focuses on minimising risk and reducing stress on you to save your physical records data. By planning and scoping a migration project we can ensure the success of any transition to a new platform. To support this, RecordPoint has a standardised migration planning project that has the following objectives:

- Plan and confirm the migration scope, objectives and approach;
- Agree success criteria for the migration;
- Agree roles and responsibilities during the migration work; and
- Provide a Statement of Work to perform migration work.

A Migration Planning project includes the following high-level tasks:

- Migration Planning workshops
- Assessment of source system schema, data extract and binary storage
- Complete a high-level migration approach and scope document
- Develop the data mapping schema for the migration
- Review and sign off the approach, scope, and data mapping
- Agree data testing and validation metrics
- Produce a SOW to execute on the migration

A migration planning project is estimated at 10 days assuming a single source system.

General Consulting Project

In some cases, simple ad hoc assistance is required. In these situations, an Information Governance consulting Statement of Work (SOW) project can be used. The days can be based on your needs with agreed dates for the expiry of pre-bought consulting time. Our team of Information Governance Experts can help you navigate many common business challenges faced such as Information Governance program strategy, operating model design, strategic planning, communications and change planning, and many other topics.

The guidelines for a general consulting SOW are:

- Customer and RecordPoint must nominate an "authorized person" who can authorise work against the SOW
- Time must be used in a minimum of 2-hour blocks
- RecordPoint resourcing requires a minimum of five business days for requested services to be initiated
- Remaining budget update will be provided on request
- Time and Materials billing based on the pricing in our pricing documentation

Wave Planning and Onboarding

A wave plan breaks down complex information and data governance programs into manageable work packages. Waves are modular and flexible to deliver against business outcomes and priorities, each with an objective and success criteria defined.

Wave 0 is typically planning and discovery where key requirements are defined, success criteria established and acceptance criteria for future waves. Wave 1 onwards will each have an objective and associated deliverable against that objective to deliver business outcomes.

Professional services will work with a customer to understand their required business outcomes, priorities and maturity in information and data governance to then put a wave plan together to deliver on those requirements.

These types of implementations are aimed at our larger/strategic customers who have an extensive and complex content footprint that want to solve/implement in smaller projects.

Wave Planning

Wave planning takes approximately 3 days effort and includes:

- Maturity Assessment
- Business objectives workshop
- Business priorities workshop
- Wave plan construction
- Statement of Work for Implementation

Onboarding Waves

Your onboarding project will be organized in a sequence of waves that will vary in size depending on the outcomes from the wave planning exercise.

Maturity Assessment and Roadmap Project

In some cases, you may have tools such as RecordPoint and the associated technology components to enable a modern, cloud collaboration and compliance program for your organization, but there are often challenges that impact your Information Governance program outside of having a quality technology solution that may prevent you from being able to achieve that goal. Common issues may include:

- General lack of information governance and user guidance relating to the usage of the primary document and records management tools, e.g. the wider Microsoft 365 suite;
- Poor user adoption of the platform, with a number of informal information repositories such as unapproved source solutions and personal drives, being used as an alternative method for document management and collaboration;
- Variable compliance with regulatory requirements across the organisation, including statutory requirements or organizational/government policy;
- Increasing risks associated with data loss, inefficiency information discovery and general user productivity; and
- Low executive sponsorship or support from IT to enforce information governance policies and standards

To assist you in addressing these challenges, we will work with you to complete an information management maturity assessment and produce an Information Management Solution Roadmap that defines an optimized target state for your information management solution and details the architecture, requirements and recommended approach to get there.

The outcome is a detailed Information Management Roadmap that can be used as the basis for planning the broader IM Solution implementation and will include the following components:

- Current information management maturity assessment and outline of desired maturity;
- Alignment of the IM strategy with the Customer's broader business and technology strategy;
- Current state assessment and target state definition;
- Information Management maturity assessment;
- Proposed Solution Architecture and high-level design principles;
- Information Management roadmap, key recommendations and deployment plan;
- Information Management Solution implementation budget estimates;
- Executive socialisation materials; and
- Next steps for the Information Management Solution implementation.

A maturity assessment and high-level roadmap engagement is estimated at 20 days. Detailed roadmap planning and executive socialisation materials may increase estimated days.

RecordPoint Training

RecordPoint can provide you with additional administrator training and support for ad hoc questions after completing customer onboarding. Training can include revisiting any training provided during onboarding.

Working with you to tailor the Administrator training to target gaps in your team's knowledge. The core administration training offer is estimated to be 2 days, however if additional training or staff are required to be trained, this could increase the estimate.

RecordPoint Extended Onboarding Services

RecordPoint's Extended Onboarding Services provide you with a scalable, predictable, and cost-effective model for expanding information governance across your organization and gradually expanding the source solutions under management over time. This streamlines the onboarding of new business applications by incorporating connector deployments, rule optimization, metadata enrichment service, and annual training into a single subscription with repeatable activities and defined annual outcomes. Designed to address challenges such as exponential data growth, addressing complex band-aid workflows that regularly produce redundant, obsolete, and trivial information (ROT), support decommissioning legacy systems as they sunset, and reduce compliance complexity. The offering helps maintain the health of your information governance program while simultaneously expanding your impact. Ensuring you are continuing to drive value from your subscription and receive support in adopting the innovative features that are regularly released in the RecordPoint's platform.

These services help you increase operational efficiency by reducing manual classification, retiring legacy repositories, and improving data quality through enriched metadata service and optimizing rules as new data sources are connected to your RecordPoint platform. The services support predictable budgeting and scalable records management growth while boosting user readiness and adoption through annual training, ultimately enabling a more mature, efficient, and resilient information governance program.