

SAMPLE

Corporate Proposal for Server Migration Project (Exchange 2010)

Executive Summary

Generic Law Firm is using a single-instance Exchange Server as the primary application server for the law practice. There is extensive use of the public folders, calendaring and indexing. Because of previous problems with the store, backups are not always successful and are a single point of failure for the organization. This was the case with a system failure recently.

The server is currently running Exchange Server 2003 Enterprise on top of Windows Server 2003 R2 platform. Both the application and server are at the end of standard support and entering extended support. It is strongly recommended that Exchange be upgraded to Exchange 2010 on a Windows Server 2008 R2 platform.

The server hardware is approaching three years old, and although not at the end of life, it is recommended that a new server with virtualization capability be installed for the migration. By migrating to a new server instead of an in-place upgrade, a swing server is not needed, thus reducing the overall project cost.

This virtual server platform will also be the basis for other server migrations in the *Generic Law Firm* environment.

In conjunction with the Exchange deployment, one virtual 2008 R2 Domain Controller will be deployed. Acronis True Image will be implemented as the backup solution. Finally, new switches will be installed to dramatically improve overall network access.

Business Benefits

- Environment stability will be improved
- Cost savings on future migrations as applications need to be migrated to new platforms
- Improved external access for mail including integrated calendars
- Built-in archival and security for compliance

Technical Benefits

- Improved administration
- Mailbox size issues are minimized
- Simplified Disaster Recovery
- Improve reliability and supportability of the Exchange environment
- Reduction in recovery time for hardware and software

Scope

The Exchange Server project will also serve as the foundation for future infrastructure enhancements. The server has the capacity to accommodate several virtual machines for future growth.

- Installation of XenServer 5.6 on an HP 350 DL server capable of hosting four virtual servers
- On one virtual machine, a virtual domain controller will be created, using Windows Server 2008 R2 and will contain the Global Catalog for Exchange.
- Implementation of Exchange 2010 on one of the virtual Windows Server 2008 R2 installations.
- Two Exchange mail stores will be created. One store will contain active mailboxes for each *Generic Law Firm* user, the second will contain currently archived public folder data. A third data store will be created to accommodate the current public folders.
- The current Exchange server will be decommissioned and evaluated for future use.
- The Netgear switch will be replaced with an HP managed switch in order to ensure adequate access times.

Testing Methodology

Each change made to software or hardware configuration will be tested by *Consulting Company*. Changes involving infrastructure alterations and migrations will be tested for at least one week prior to the former configuration being fully removed from the environment. Backups of the server data and configurations prior to final migration will be stored for six months and available for restoration in part or in whole as required.

Checkpoint Reviews

As each server is built, the functionality will be tested. Each virtual server will be reviewed by *Consulting Company* and *Generic Law Firm*. There will be a sign-off by *Generic Law Firm* indicating that users have accessed, confirmed, and verified application configurations and data.

There will be a checkpoint review when 80 percent of the allocated hours have been used to ensure the project is on schedule.

A checkpoint meeting may be requested by either *Consulting Company* or *Generic Law Firm* at any time during the project and must be convened within 48 hours of the request.

Risk Analysis

This is a low-risk project because data will not be removed from the original servers until the new installation is fully completed and all data integrity is confirmed. To mitigate risk, the retired servers may be stored on location for a period determined by *Generic Law Firm*.

There will be some downtime for all users during the cutover, file migration, and mailbox migration. A schedule will be established for downtime during business and non-business hours.

Please note that there is normally a 50 percent surcharge for work performed after 7:00 p.m. on week days and on weekends.

Project Coordination

The *Consulting Company* Project Coordinator will be Principal along with Administrator from *Generic Law Firm*. They will together be responsible for the coordination of resources assigned to the implementation. Working cooperatively with Administrator, the Project Coordinator will:

- Serve as the main point of contact for scheduling all consulting, conversion and training resources during the project
- Coordinate and facilitate the project timeline and each of its parts.
- Assist in troubleshooting with issues that pertain to the project plan and timeline.
- Provide regular status calls including updates regarding the following: project plan updates, implementation milestones, change orders and project hours billed to date.

Communications Plan

- Principal will own weekly status communications from *Consulting Company*. Status will be sent at the end of each business week to John Doe, Atty. and Administrator summarizing activities and progress.
- Principals of *Consulting Company* will coordinate scheduling and communications with John Doe, Atty. and Administrator to ensure staff are aware of possible outages and interruptions.

Assumptions

Consulting Company assumes the following when performing the services described in this Scope of Work:

- Access to user's mailboxes will be available as scheduled.
- Pricing is based on a live data migration for all applications
- If professional services are performed on-site, the *Consulting Company* Engineer will perform work during the days of Monday through Friday during normal business hours.
- The following activities are normally considered part of billable work and are incorporated into a 20 percent project management fee. This fee has been waived, courtesy of *Consulting Company*:
 - Phone time to discuss the project
 - Meetings regarding the project
 - Project planning, managing and status reporting
 - Designing, configuring, programming and testing the solution
 - Producing required documentation
- Once the project schedule is created any deviation from that schedule, outside of *Consulting Company's* control, is subject to possible penalty.

Exclusions

- Blackberry devices will remain on the current Blackberry server
- There will be no increase in bandwidth for external connectivity
- Software upgrades and conversions outside of Exchange and SharePoint.
- Application upgrades will be determined during the discovery phase. Upgrades may result in additional charges from the software manufacturer and *Consulting Company* of Boston.

Fees and Billing

Express Warranty

For the purposes of this engagement, *Consulting Company* warrants that *Generic Law Firm* will be satisfied with both the quality of our work and the suitability of this solution to meet business goals as stated in this proposal. In the event that *Generic Law Firm* is not satisfied, *Consulting Company* will endeavor, in good faith, to resolve any such dispute by all reasonable means, including waiver of labor fees.

Project Scope Sign-Off

Generic Law Firm: John Doe, Atty.

Approved: _____

Date: ____/____/____

Consulting Company: John Doe, Jr.

Consulting Company of Boston

Approved: _____

Date: ____/____/____