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# Management Proposal

## OSOS Migration to WATech Tenant – Feasibility Study

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**Proposal Submitted by**



**LaSai Technologies, LLC (DBA [Digitech Labs](https://www.digitechlabs.com))**  
[www.digitechlabs.com](https://www.digitechlabs.com)

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**Note:** The logo and name State of Washington, Office of the Secretary of State (OSOS) are used in this document only to reflect Digitech Labs’ proposal. We acknowledge that the logo is the IP and property of WA State/respective WA State agencies.

# 1. Management

## A. Project Management

### 1. Project Team Structure/Internal Controls

Our project team structure is designed to ensure optimal performance and accountability. Our approach's core is a team of experienced professionals, including Project Managers, Project Engineers, Solution Architects, Senior Engineers, etc., each with a defined role contributing to the project’s success. Our team members are skilled in their respective areas and bring a collaborative spirit essential for any complex project.

The internal controls we establish are the backbone of our project management strategy. These controls are not merely checkpoints, but a comprehensive system designed to monitor project activities and ensure adherence to timelines, budgets, and quality standards. Regular audits will assess the project’s health and alignment with its objectives. Milestone reviews will serve as strategic sessions to evaluate progress and make necessary adjustments. Performance evaluations will be ongoing, providing team members with the feedback needed to excel.

Transparency is a critical principle in our management approach. We believe that an open environment fosters trust and encourages a culture of mutual accountability. Our project dashboard will be accessible to all stakeholders and provide real-time insights into project metrics and progress.

Continuous improvement is another cornerstone of our strategy. We are committed to learning and evolving throughout the project lifecycle. Our adaptive management practices ensure we are responsive to changing conditions and can swiftly implement corrective measures.

Issue resolution mechanisms will be in place from the outset. We understand that challenges are inevitable, but our initiative-taking stance on issue management will mitigate risks effectively. Our escalation matrix will outline clear pathways for addressing issues at the appropriate levels, ensuring prompt and effective resolution.

Our project team structure and internal controls are designed to deliver excellence. We are committed to a management approach that is structured yet flexible, rigorous yet adaptive, and always aligned with the project’s best interests. Our goal is not just to meet expectations but to exceed them, delivering a project that is a benchmark of success.

### 2. Organizational Chart

The organizational chart will depict the hierarchy within the project team, illustrating the flow of authority from the project manager down to individual team members. It will also show the support and reporting structure, ensuring each team member understands their role within the broader organization. This chart will be a vital tool for maintaining order and clarity throughout the project lifecycle.

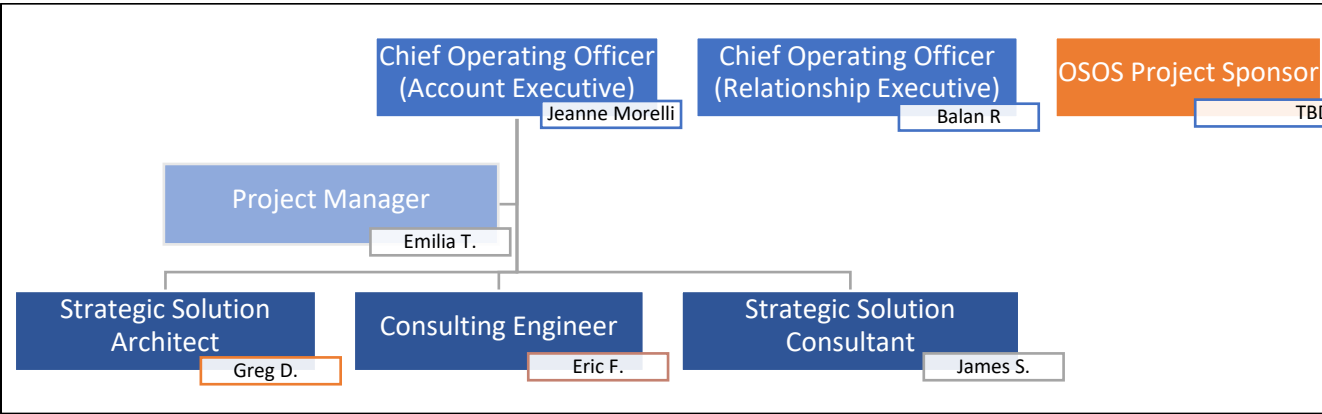


Figure 1: Project Organization Chart

### 3. Responsibility and Authority

Our proposal will define the individual with prime responsibility and final authority over the project. This leader will be the main point of contact for all project-related inquiries and decisions, ensuring a streamlined decision-making process. Our organization's full support will back its authority, guaranteeing the necessary resources and attention for project success.

4. Subcontractors

It’s an integrated team from Digitech Labs and Proarch that will deliver on this engagement. Digitech Labs is the prime and Proarch is the sub-contractor proposed. We have established processes and structure that help us deliver on projects as ‘One’ team.

5. Management Approach

Our management approach will be comprehensive, covering all phases of the project from initiation to closure. We will detail our methodologies, including Agile, Waterfall, or hybrid methods, and explain how these will be tailored to the project’s specific needs and requirements. Our approach will prioritize flexibility, efficiency, and stakeholder engagement, ensuring we deliver the project on time, within budget, and with high-quality standards.

Following the Project Management Institute (PMI) and the Project Management Body of Knowledge (PMBOK) guidelines, we will apply the best project management practices. We will use a project charter to define the scope, objectives, deliverables, roles and responsibilities, assumptions, constraints, and risks. We will also use a work breakdown structure (WBS) to decompose the project into manageable tasks and subtasks and assign them to the project team members. We will use a project schedule to estimate each task's duration, resources, and dependencies and track the project's progress and performance. We will use a project budget to estimate the costs and revenues of the project and monitor the project expenditures and cash flow. We will use a project communication plan to identify stakeholders' communication needs, channels, frequency, and formats and ensure timely and accurate information exchange. We will use a project risk management plan to identify, analyze, prioritize, and mitigate the potential risks that may affect the project outcomes. We will use a project quality management plan to define the project deliverables' quality criteria, standards, and metrics and implement quality assurance and quality control measures. We will use a project change management plan to manage the changes that may occur during the project lifecycle and ensure that they are rigorously evaluated, approved, and documented. We will use a project closure plan to finalize the project activities, deliver the project outputs, obtain the project acceptance, and conduct the project evaluation and lessons learned.

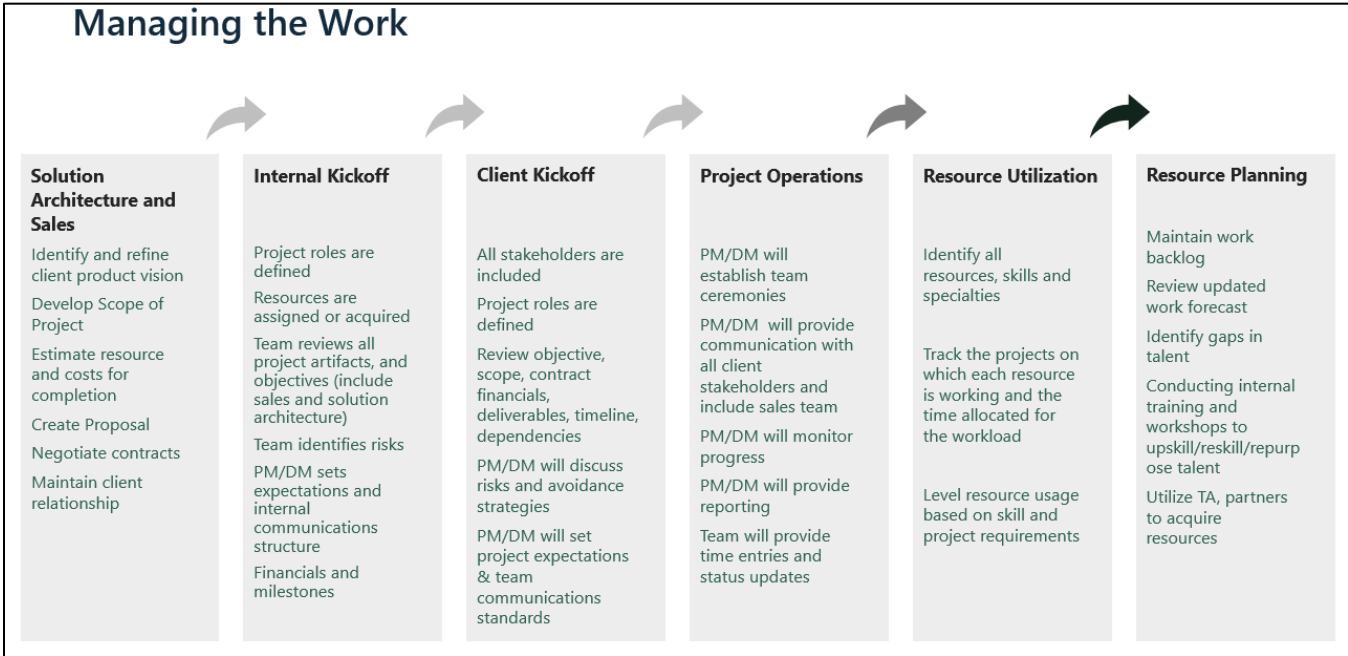


Figure 2: Our Proven approach for enabling engagement success

Task	Description
Pre-Internal Kick-Off	Verification and facilitation of administrative requirements before starting the project.
Internal Kick-Off Meeting	Internal review of project SOW, objectives, coordination, and administrative items with the Account Executive, Engineer, pre-sales, & Project Manager.
Client Kick-Off Meeting	Client review of project SOW, objectives, coordination, and administrative items with Account Executive, Engineer, & Project Manager.
Project Management	Overall project Life Cycle management and process administration.

<i>Client Status Update Communications</i>	Compile and convey a weekly report to the client, reviewing project progress, status, next steps, dependencies, constraints, and scheduling.
<i>Internal Project Communication</i>	Internal project coordination communications.
<i>Internal Meetings for MITS or multiple Projects</i>	This is an internal meeting to inform stakeholders in Support / MITS work of changes in the environment forthcoming from this project. It could also be used for multiple projects.
<i>Project Timeline Development</i>	Time for the PM and Technical team to develop a timeline of phases, cutovers, and dependencies.
<i>Success Criteria</i>	Document Success Criteria
<i>Washington State Employment Security Department - Project Work</i>	Engineer Project work
<i>Engineer Project Communications</i>	Direct communications between the client and the engineer for task coordination and facilitation.
<i>Vendor Meetings and Coordination</i>	Vendor Meetings and Coordination
<i>Onsite Discovery</i>	Onsite Discovery for Two resources for four onsite days plus one day travel time.
<i>Remote Discovery</i>	Two or three resources working on discovery items remotely
<i>Remote Assessment</i>	Two or three resources working on Assessment items remotely
<i>Remote Documentation</i>	Two or three resources working on Documentation remotely
<i>Delivery of Feasibility Study</i>	Resources to deliver the Feasibility Study
<i>Complete the technical documentation and submit it for peer review.</i>	Compile a complete set of all project-related technical and system documentation. Submit it to the Direct Manager or Project Technical Lead for final review before conveying it to the client.
<i>Technical Documentation Peer Review</i>	Review and approval of documentation by the Direct Manager, VP of Cloud Infra, or Project Technical Lead
<i>Post-Project Summary Report</i>	Completion of the Post-Project Summary Report
<i>Verify success criteria and Solution Design with the client</i>	Convey a copy of approved project documentation to the client. Review the completed project work and verify that project success criteria have been met.
<i>Internal Closeout Meeting</i>	Internal Closeout Meeting for Project Team to review SOW/Proposal and confirm completion of all requirements
<i>Project Closeout and Acceptance</i>	Review and verify with the client that all project-related tasks have been completed according to the SOW. Then, review the Project Acceptance Signoff process with the client.

## 6. Tools and Techniques

As per the requirement, we will list the project management tools and techniques utilized, such as Gantt charts, Kanban boards, or any other project management software. These tools will facilitate effective planning, execution, monitoring, and closing of project activities. Wherever appropriate, we will leverage the Cloud/ Application/Systems assessment and migration tools from Azure, AWS or others in the process of our work on this engagement.

7. Governance

The governance structure will be outlined, detailing the roles and responsibilities of governance bodies such as steering committees or project boards. This structure will ensure proper oversight and strategic guidance throughout the project.



Figure 3: Project Governance

8. Reporting and Communication Plan:

A comprehensive reporting and communication plan detailing reports' frequency, methods, and content will be provided. This plan will ensure that all stakeholders are kept informed and engaged, with clear channels for feedback and collaboration.

9. Quality Control

Our quality control processes will be described, including the standards, metrics, and reviews that will be used to ensure the highest quality of deliverables. We will commit to continuous quality improvement, learning from each project phase to enhance future performance.

10. Risk Management

Our risk management strategy will be robust, outlining the risk identification, assessment, mitigation, and monitoring processes. We will demonstrate a proactive approach to managing potential challenges, ensuring the project remains on track.

**B. Staff Qualifications/Experience**

It’s with a complete understanding of the OSOS current state and migration requirements that we chose to leverage our partner/sub-contractor Proarch for this engagement. With over 350 clients and nearly 500 employees, they are a Recognized Microsoft Gold Partner in the U.S. and India.



Gold  
Microsoft  
Partner

Microsoft

Microsoft Gold  
Partner



2021 Microsoft Top  
350 U.S. Partners



2019 CRN Managed  
Services Provider 500



2019 & 2018 Top 200 Public  
Cloud Managed Services  
Provider

Our identified team comprises of highly qualified professionals with extensive experience managing and delivering complex projects. We have carefully chosen each team member based on their expertise, track record, and suitability for the project’s specific needs.

In the next section, we will provide comprehensive profiles for each team member, highlighting their roles, responsibilities, and time allocation for the project. We affirm that we are 100% compliant with the asks in Section 1.3 of the RFP.

Our consultants planned to be deployed for this engagement far exceed the basic qualifications. The team performing the feasibility study has three technical subject matter experts. The combined experience in executing complex cloud migration projects exceeds over 5 decades. Additionally, these consultants collectively have over 2 decades of proven proficiency in all the following areas:






**Cloud Technologies:**








- Microsoft Azure Solutions Architecture
- Microsoft Azure Identity and Access Administration
- Microsoft Azure General Administration
- Microsoft Office 365 Administration

**Enterprise Technologies:**

- Microsoft Windows SQL Server
- Microsoft Windows Server
- Microsoft Server roles and features with emphasis on:
  - Active Directory Domain Services
  - File and Storage Services
  - Hyper-V

**Our Teams’ Microsoft Certifications**







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**Our Microsoft Competency includes,**

- Gold Security
- Gold DevOps
- Gold Enterprise Mobility Management
- Gold Data Analytics
- Gold Datacentre
- Gold Cloud Platform
- Gold Cloud Productivity
- Gold Windows and Devices
- Gold Application Integration
- Gold Application Development
- Gold Messaging
- Gold Collaboration and Content
- Gold Small & Midmarket Cloud Solutions
- Silver Communications
- Silver Project and Portfolio Management

Our Advanced specializations include,

- Azure Virtual Desktop Advanced Specialization
- Cloud Security Advanced Specialization

Thus, our team’s qualifications cover various competencies, from project management and technical skills to strategic planning and communication. Our team members have completed projects in multiple domains, such as the public sector, healthcare, education, finance, and technology. They have also received training and certifications in relevant areas, such as agile methodology, cloud computing, and project management. Our team is committed to working collaboratively with the client and other stakeholders, ensuring the project’s objectives are met and exceeded.

## **1. Resumes and Skills**

Our team members' resumes reflect a diverse array of skills and experiences tailored to the demands of this project. Their educational backgrounds, professional certifications, and significant accomplishments are all geared toward delivering excellence. We will include information on everyone's skills related to this project, ensuring that our team’s capabilities are fully transparent and aligned with the RFP’s objectives.

### **GREG D. (STRATEGIC SOLUTIONS ARCHITECT)**

Seasoned and successful IT professional with over 30 years of experience managing major technical engagements, designing, and deploying IT architectures, and overseeing multi-million-dollar P&Ls for clients in diverse industries. They have demonstrated a track record of delivering large-scale deployments on time/ budget and leveraging project successes to bolster revenue growth. Proven team-builder and leader committed to identifying and harnessing emerging technologies and resolving complex technical problems to ensure exceptional client satisfaction. The focus has been on Microsoft’s Cloud environment, including Office 365 and Azure.

### **SKILLS MATRIX OF KNOWLEDGE, SKILLS, AND ABILITIES**



Name	Greg D.			
Degree / Institution Name / Certification	B.S. Management Information Systems, University of South Florida Microsoft Certified Master – Exchange Microsoft Certified Professional (Since 1994) Microsoft 365 Certified: Enterprise Administrator Expert Microsoft 365 Certified: Security Administrator Associate Microsoft® Certified Solutions Associate: Cloud Platform Microsoft® Certified Solutions Associate: Office 365 Microsoft Certified Systems Engineer - Legacy (MCSE) Microsoft Certified IT Professional (Charter) Microsoft Certified Technology Specialist (Charter)			
Knowledge, Skills, and Abilities	Years of Experience	Year Last Used	Company and Project	Skill level
Microsoft Azure IaaS	8	2024	Multiple private and Public Sector	Proficient
Microsoft Azure PaaS	8	2024	Multiple private and Public Sector	Proficient
Experience in managing and leading e-mail migration projects	30+	2024	Message Florida, Microsoft, Multiple private and Public Sector	Extensive
Experience in managing Microsoft 365 Cloud environment	16+	2024	Microsoft, Multiple private and Public Sector	Extensive
Experience securing and auditing the Microsoft Cloud (DLP, EOP, ATP, Azure)	12	2024	All Florida State Agencies, Pentagon, Central Command (Tampa)	Extensive
Experience with the Microsoft Power Platform	4	2024	Multiple private and Public Sector	Proficient
Experience in Microsoft Azure Virtual Desktop	5	2024	Microsoft. Multiple private and Public Sector	Extensive
Additional Knowledge, Skills, and Abilities	Years of Experience	Year Last Used	Company and Project	Skill level
PowerShell Scripting	10+	2024	Microsoft, Multiple private and Public Sector	Extensive
Azure Active Directory	13	2024	Microsoft, Multiple private and Public Sector	Extensive
Active Directory	22	2024	Microsoft, Multiple private and Public Sector	Extensive

Jim S.: Strategic Solutions Consultant

Jim Spignardo is an experienced Strategic Solutions Consultant with over 25 years of expertise in delivering innovative and customized IT solutions for clients across various industries. Based in Syracuse, New York, Jim specializes in Microsoft server and networking technologies, cloud migrations, network security design, and workplace modernization. He holds multiple Microsoft certifications, including MCPS, MCSE, CISSP, and Information Protection Administrator Associate. Jim is dedicated to helping clients achieve their maximum potential by leveraging our expertise in managed IT support services, IT consulting, product engineering, data analysis, and data science.

Jim's professional journey includes roles such as VP of Cloud and Infrastructure and Cloud and Infrastructure Team Manager at ProArch, Network Engineer at St. Joseph's Hospital Health Centre, and Technical Instructor at New Horizons CLC. His mission is to assist clients in navigating their digital transformation journeys, and he has a keen interest in generative AI and its potential to transform business processes. Jim is proud to be part of a 300+ strong IT organization, working with a talented and diverse workforce.

Certifications	<ul style="list-style-type: none"><li>Microsoft Certified Systems Engineer: MCSE</li><li>CISSP: Certified Information Security and Systems Professional</li><li>MCP: Microsoft 365 Security, Azure Security, Information Protection</li><li>CMMC RP: CMMC Registered Practitioner</li><li>CompTIA A+, Network+, Security+</li><li>Bachelor of Arts – Social Studies Education, 1991, GPA 3.4 (Cum Laude)</li></ul>
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Experience	Systems Integration	Implementation, design, and migration
	Discovery and Gap Analysis	Utilize tools and processes and implementation services.
	Virtualization	Management and deployment of virtualized environments, Azure, Hyper-V, and ESXi
	Azure Cloud	Dark-to-Cloud Azure Migrations, Configuration, Deployment, Intune/MDM
	Systems Administration	25+ years of experience developing and maintaining technology environments

The Strategic Solutions Consultant is responsible for the following:	
<ul style="list-style-type: none"> <li>Working on strategic accounts and providing <b>Architectural Design support</b> for IT projects.</li> <li>Defining and developing <b>Standard Operating Procedures</b> and documentation templates.</li> <li>Engaging with the Delivery Teams at ProArch to ensure <b>seamless coordination</b> and productive collaboration.</li> <li>Establishing consultative and long-term strategic relationships with select clients and prospects to uncover additional upsell and cross-sell opportunities, thereby increasing revenue and deepening client relationships.</li> <li>Becoming part of the Account Team for specific target accounts and working closely with the sales team to understand their challenges and goals, providing tailored solutions that can enhance the sales process and help close more deals.</li> <li>Improving customer experience by helping customers understand the value of the products or services offered by the company, identifying their needs, and providing tailored solutions that meet their specific requirements.</li> <li>Increasing efficiency by offloading tasks such as developing customized solutions or conducting in-depth product research from the sales team, allowing them to focus on selling.</li> <li>Providing a competitive advantage by offering customized solutions and unparalleled customer service, helping the company stand out from the competition and win more business</li> </ul>	

Eric F.: Consulting Engineer

Certifications	<ul style="list-style-type: none"> <li>Microsoft 365 Certified: Security Administrator (MCSA)</li> <li>Microsoft Certified Solutions Expert: Cloud Platform and Infrastructure (MCSE)</li> <li>VMware Certified Professional 7 - Desktop and Mobility</li> <li>VMware vSphere Foundations</li> </ul>	
Experience	Systems Integration	Implementation, design, and migration
	Discovery and Gap Analysis	Utilize tools and processes and implementation services.
	Virtualization	Management and deployment of virtualized environments, Azure, Hyper-V, and ESXi
	Azure Cloud	Configuration, Deployment, Intune/MDM
	Systems Administration	20+ years of experience developing and maintaining technology environments

The Consulting Engineer is responsible for the following:	
<ul style="list-style-type: none"> <li>Perform strategic technology assessments, including data gathering, analysis, and recommendations.</li> <li>Align organization technology goals with business requirements.</li> <li>Troubleshoot network and system issues.</li> <li>Security best practices system hardening</li> <li>Collaborate with clients in different vertical markets.</li> <li>Interface with other third-party vendors, i.e., hardware, software, and service providers</li> <li>Work individually and as part of a team.</li> <li>Interface with clients remotely, over the phone, and on-site</li> <li>Develop product and solution recommendations for deliverables and presales opportunities.</li> <li>Budget and time estimation</li> </ul>	

Engagement Summary		
Client	Role	Project
Ironwood Generating (Pennsylvania)	Senior Engineer	Gap Analysis and Plans of Action and Milestones (POAM)
Notable Activities	<ul style="list-style-type: none"> <li>Assisted in the assessment of existing IT systems.</li> <li>Develop and deliver assessment report</li> </ul>	

Client		Role	Project
Troy Energy (Ohio)		Senior Engineer	IT/OT Gap Analysis (Troy Energy) - Phase 2 Remediation
Notable Activities	<ul style="list-style-type: none"> <li>Enroll systems in Endpoint Management</li> <li>Workstation security hardening</li> <li>Enabled multifactor authentication for access.</li> <li>Email security hardening</li> </ul>		
Client		Role	Project
Riverside Generating Power Station (Kentucky)		Senior Engineer	Riverside - OTIMS & EDR
Notable Activities	<ul style="list-style-type: none"> <li>Operation Technology Management implementation</li> </ul>		

Client		Role	Project
Kingsburg Cogeneration (California)		Senior Engineer	IT Infrastructure Remediation
Notable Activities	<ul style="list-style-type: none"> <li>Network Isolation</li> <li>Workstation upgrades and hardening</li> </ul>		

### Emilia T.: Project Manager

Certifications	<ul style="list-style-type: none"> <li>Microsoft 365 Certified: Fundamentals</li> <li>Microsoft Certified: Azure Fundamentals</li> <li>Intro to Service Management with ITIL 4</li> <li>Agile Project Management</li> <li>IT Project Management for Beginners</li> <li>Fred Pryor Project Management</li> <li>Bachelor of Arts – SUNY Geneseo</li> </ul>	
Experience	Systems Integration	Implementation, design, and migration
	SharePoint	Implementation, design, and migration.
	Cloud Modernization	Deployment of fully virtualized environments, both Hyper-V and VMWare ESXi platforms, Virtual Application Platforms
	Stakeholder Management	Establish a trusted working relationship with key project stakeholders.
	Risk Management	Develop criteria to prioritize, identify, and mitigate risks.
	Project Management	Facilitate collaboration, communications, and coordination across the project team.
	Documentation	Responsible for delivery of Project documentation

#### The Project Manager is responsible for the following:

- In-depth understanding of project requirements
- Strategic planning and implementation with key stakeholders to develop and execute long-term business goals.
- Advise and guide project stakeholders towards successful execution of all project phases.
- Foster an environment of collaboration and resource development.
- Facilitate conflict resolution concerning the project scope and between stakeholders.
- Coordinate regularly scheduled meetings to review project progress, updates, and opportunities.
- Generate and deliver project-related documentation and metrics as the agreed-upon project plan outlines.
- Coordinate technical project resources and facilitate the development of project timelines and schedules.
- Advise and guide project stakeholders towards delivering and implementing solutions on time and within budget.

#### Engagement Summary

Client		Role	Project
Multiple – Power Industry		Project Manager	Operation Technology (OT) Insights and Managed Services
Notable Activities	<ul style="list-style-type: none"> <li>Supported Program Manager with implementing comprehensive OT security and support projects in line with NERC industry regulations, generating multiple ongoing support contracts.</li> </ul>		

Client		Role	Project
Multiple - Power Industry		Project Manager	OT Assessments, Discovery & Gap Analysis

Notable Activities	<ul style="list-style-type: none"><li>Executed multi-phased projects, including Discovery and Gap Analysis &amp; Plan of Action and Milestone (POAM), to support onboarding and provide required upgrades to meet compliance and organizational standards.</li></ul>
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Client	Role	Project
Energy O&M	Project Manager	Greenfield Remote Operations Center (ROC)
Notable Activities	<ul style="list-style-type: none"><li>Facilitated the implementation of a greenfield Remote Operations Center.</li></ul>	

Client	Role	Project
Generation Facility	Project Manager	Distributed Control System (DCS) Upgrade
Notable Activities	<ul style="list-style-type: none"><li>Developed, coordinated, and executed the migration plan with General Electric (GE) and Emerson installation services, providing hardware, security, networking, and ongoing support services.</li></ul>	

2. Commitment to Staffing

Our staffing plan reflects our commitment to the success of this project. We have carefully selected the professionals working on this project based on their skills, experiences, and alignment with the RFP’s objectives. The resumes of our team members demonstrate their diverse and relevant qualifications and significant achievements in similar projects. We will provide detailed information on the skills and roles of each team member, ensuring that our capabilities are fully transparent and meet OSOS’s expectations.

3. Staff Substitution Process

If staff substitutions become necessary during the project, we will follow a clear and structured process to manage such changes without affecting the project quality or timeline. This process involves the following steps: (1) promptly notifying OSOS of any staff changes and the reasons for them; (2) providing detailed resumes and qualifications of the proposed new personnel for OSOS approval; (3) ensuring a smooth handover of tasks and responsibilities between the outgoing and incoming staff; and (4) soliciting feedback from OSOS on the performance and integration of the new staff. Our priority is to maintain the integrity and continuity of the project team, and we will comply with all OSOS requirements for staff substitution.

4. Organizational Support

Our organization is fully committed to supporting the project team and ensuring the successful delivery of the project. We will provide each team member with the necessary resources, tools, and organizational backing to perform their roles effectively and efficiently. Our support structure empowers our staff, fosters collaboration, and drives project success. We will also facilitate regular communication and coordination among the project team, OSOS, and other stakeholders. Our organization has a proven track record of delivering high-quality services and solutions to our clients, and we will leverage our expertise, experience, and best practices to meet the objectives and expectations of this project.

## C. Experience of the Contractor

### 1. Experience of the Contractor

We have delivered multiple digital/cloud/application assessment, design and transition to a futuristic solution platform for our customers.

Digitech Labs and its proposed partner/sub-contractor in this proposal, ProArch are both focused on technology consulting and solutioning. Proarch is operational since 2006 and has established a significant reputation through its global presence, >350 employees and 500+ customers as a reliable, high-end technology consulting company. Digitech Labs, in contrast, is in its 7<sup>th</sup> year of operations with 80+ resources and 70+ customers to its tally. Between Digitech Labs and Proarch, we have partnered on 30+ projects delivering each one successfully.

Proarch has delivered similar contracts to many customers including Bergman Engineering, Smith and Jones Consulting, ABC Industries, etc. Hare are some sample projects that Digitech Labs/Proarch have delivered in the past 5 years as relevant to the scope of work of this RFP. These are the same projects for which we have provided customer references, as required, providing a connect to our performance feedback from customers.

#### 1.1Project 1: Office 365 Tenant to Tenant migration with AD Consolidation

Reference 1	
Company Name:	Colliers Engineering & Design
Project Reference No.:	T20221101.0304
Project Duration:	8-10 weeks
Contact:	Oscar Pardo
Phone:	305-938-9066
Email:	oscar.pardo@colliersengineering.com

- The purpose and scope of the project:** The project was migrated to KFW Engineers & Surveying’s users and data to the existing Colliers Office 365 tenant and a consolidated Active Directory, using a two-phase approach with minimal disruption.
- The proposed solution and deliverables:** The proposed solution was involved using the Quest toolset to migrate the Active Directory resources and multiple tools to pre-stage and over the Office 365 data, including Exchange Online, SharePoint Online, OneDrive, and Teams. The deliverables included a discovery and planning document, a security review, a migration plan and design, technical documentation, and an admin overview.
- The prerequisites and responsibilities for the client and ProArch:** The client was responsible for providing access, information, materials, communication, and backup for the project. The client was also responsible for licensing costs, SMTP re-configuration, and deployment of domain controllers. ProArch was accountable for scheduling resources, showing up on time, providing the agreed-upon deliverables, and assigning the client partner of record.
- The experience and qualifications of ProArch and its subcontractors:** ProArch a cloud solution provider and a Microsoft partner with expertise in cloud migration, security, and management. ProArch with a team of certified engineers and project managers who have successfully delivered migration projects for various clients in different industries. ProArch also worked with subcontractors with relevant skills and experience in the specific workloads and tools involved in the project.

Client	Services Offered	Description
Colliers Engineering & Design	Office 365 Tenant to Tenant Migration	Collier's has a long term acquisition strategy. ProArch proposed a two-phase migration for Colliers Engineering & Design, which involved consolidating Active Directory and migrating Office 365 data after the acquisition of several businesses. ProArch continues to assist Collier's in their acquisition strategic and tactical tasks.
	Technology Utilization	Colliers Engineering & Design employs Agile Framework's MetaField solution, a cloud-based SaaS platform designed by engineers to improve operational efficiency. They also use Microsoft 365 technologies and GIS management services for big data analytics.
	Active Directory Consolidation	Following the acquisition of several businesses by Colliers Engineering, ProArch was tasked with consolidating ~150 users into Colliers' existing Active Directory using Quest migration tools. Each new business acquired is transitioned into Collier's environment.
	Azure Subscription Migration	ProArch provided services to Colliers Engineering & Design's for Azure subscription migration from one tenant to a new EA subscription connected to their O365 Azure AD Tenant, aiming to centralize services and minimize administrative effort.
	Google Workspace Migration	ProArch was involved in a project to migrate a new business acquisition, a Google Workspace environment, to Microsoft services for Colliers Engineering & Design.

1.2Project 2: Tenant to tenant Migration:

Reference 2	
Company Name:	NBT Bank
Contact:	Robert Hill
Project Reference No.:	T20220912.0254
Project Duration:	4-6 Weeks
Phone:	607-337-6804
Email:	RHill@NBTBCI.COM

- The purpose and scope of the project:** The project was migrated to Retirement Direct users from the Redirect O365 tenant to the NBT Bank O365 tenant, with four workloads: Exchange Online, OneDrive for Business, Teams, and SharePoint Online.
- The proposed solution and methodology:** The project used a data-only migration approach with multiple tools that pre-staged the data from the source tenant to the destination tenant and then performed a delta migration for the cutover. The project involved various tasks such as project management, licensing requirements, account discovery, permissions migration, SMTP domain migration, and Microsoft Defender for O365 configuration.
- The project deliverables and prerequisites:** The project delivered the migration of Redirect Exchange Online, OneDrive, Teams, and SharePoint Online data to the NBT Bank O365 tenant, as well as complete technical documentation and a one-hour admin overviewed. The project assumed that the customer understands and acknowledges the hardware and software readiness, the backup responsibility, the licensing requirements, and the administrative access for ProArch.
- The project responsibilities and authorization:** The project required the collaboration and communication of both ProArch and Retdirect as the project team. ProArch assigned a project manager and qualified resources to complete the engagement, while Retdirect assigned a primary point of contact and provided access to relevant staff and information. Redirect also developed the necessary communication plan for its end users. Redirect signed the proposal and submitted the required deposits to proceed with the project.
- The legal terms and conditions:** The project was governed by the terms and conditions incorporated into the Master Services Agreement and Mutual Non-Disclosure executed between ProArch and Retdirect. The terms and conditions cover the project's acceptance, change orders, termination, cancellation, price, payment, and remedies.



Client	Services Offered	Description
NBT Bank	Office 365 Tenant to Tenant Migration	ProArch leveraged a data-only migration approach for the Office 365 tenant to tenant migration, which included pre-staging data and a delta migration approach for various workloads.
	VMware Horizon Deployment	An engagement proposal was signed to allocate resources and schedule a kick-off meeting for the deployment of VMware Horizon 8.
	Tenant Migration Support	ProArch provided support for the migration of tenants, ensuring administrative requirements were verified and facilitated prior to the start of the project.
	O365 Hybrid Migration Support	Assistance was provided to NBT Bank for the migration from Exchange Server 2010 to Microsoft Office 365, including support for IT team issues and training.

1.3Project 3: Migration to Office 365

Reference 3	
Company Name:	Worldwide Electric Corp.
Project Reference No.:	T20230628.0281
Project Duration:	4-6 Weeks
Contact:	Rod Mayette- CFO
Phone:	585-641-6485
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- Cloud-First Strategy of the proposal:** The document was recorded to the changes made in the initial proposal, such as adding workstations and AVD host to migrate, removing Printix and AD Connect, and adding BitTitan resources.
- Business objectives of the migration:** Worldwide Electric (WWE) migrated the Georator Office 365 tenant to their existing WWE Office 365 tenant, following a cloud-first strategy that prioritized security and data governance.
- Proposed solution and scope of work:** ProArch migrated Georator users and email/OneDrive workloads into the existing WWE Office 365 Cloud accounts, three workstations, and one AVD session host to WWE Azure AD. ProArch provided project management, communication, and issue resolution services.
- Project deliverables and prerequisites:** The project deliverables included the setup and testing of the migration tool, the migration of the user data and devices, the updated documentation, and the system acceptance review. The prerequisites included the client's cooperation, access, and licensing.

Client	Services Offered	Description
WorldWide Electric Corp.	Security Managed Services	This includes 24/7 Managed Detection and Response, Attack Surface Reduction services, and various other components such as Managed Cloud Identity Detection and Response, Incident Response as a Service, and more. The services are designed to improve security posture, reduce organizational risk, and provide detection and response capabilities.
	Support Managed Services and Azure Cloud Migration	ProArch has helped Worldwide Electric overhaul their IT infrastructure, providing support managed services and assisting with Azure Cloud Migration. This engagement has allowed ProArch to become an extension of WorldWide Electric's team, helping them understand opportunities, risks, and best support systems.
	Network Infrastructure Planning and Deployment	ProArch worked with Worldwide to evaluate, recommend and deploy new switching infrastructure to improve manageability, throughput, reliability, and security for WorldWide Electric.
	IT Strategy Review	ProArch has conducted an IT strategy review for WorldWide Electric, assessing the current state of the company and providing a roadmap for future development, including cloud-based Microsoft Azure and Microsoft 365 services. Worldwide Electric is acquiring businesses as part of its growth strategy. ProArch assists with the planning, architecture and implementation of the integration of services during the aquisition.