Collaboration Optimization Services

This document describes the Collaboration Optimization Services.

**Related Documents:** This document should be read in conjunction with the following documents also posted at [http://www.cisco.com/go/servicedescriptions/](http://www.cisco.com/go/servicedescriptions/): (1) Glossary of Terms; (2) List of Services Not Covered; and (3) Severity and Escalation Guidelines. All capitalized terms in this description have the meaning ascribed to them in the Glossary of Terms.

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The Collaboration Optimization Services are intended to supplement a current support agreement for Cisco products and are only available where all Product(s) in Customer’s Network is supported through a minimum of core services such as Cisco’s SMARTnet, Limited Lifetime Warranty, and Software Application Services, as applicable. Where available, Cisco shall provide the Collaboration Optimization Service described below as selected and detailed on the Purchase Order for which Cisco has been paid the appropriate fee. Cisco shall provide a Quote for Services (“Quote”) setting out the extent of the Services and duration that Cisco shall provide such Services. Cisco shall receive a Purchase Order that references the Quote agreed between the parties and that, additionally, acknowledges and agrees to the terms contained therein.
# Collaboration Optimization Services

## Table of Contents

**1. Services Summary & General Responsibilities** ............................................................... 1

1.1. Cisco Unified Communications (UC) Service ................................................................. 4


1.3. Conferencing and Instant Messaging (CIM) Service ................................................. 7

**2. Consolidated Services** .................................................................................................... 8

2.1. Audits and Assessments ........................................................................................................ 8

2.1.1. Proactive Software Recommendation Report (COS AA UC-PSR, COS AA CIM-PSR, COS AA BV-PSR) .............................................................. 8

2.1.2. Stability Audit (COS AA UC-SA, COS AA BV-SA, COS AA CIM-SA) ............... 9

2.1.3. Software Security Alert (COS AA UC-SSA, COS AA CIM-SSA, COS AA BV-SSA) .... 10

2.2. Optimization Support .......................................................................................................... 10

2.2.1. Ongoing Design Support (COS OS UC-OS, COS OS CIM-OS, COS OS BV-OS) .... 10

2.2.2. Remote Upgrade Support (COS OS BV-RU, COS OS CIM-RU) ......................... 11

2.2.3. Collaboration Optimization Remediation Service (COS OS UC-ORS) .................... 12

2.2.4. Validation Test Cycle and Review - Standard (COS OS VT) ................................. 13

2.3. Operations Management .................................................................................................... 14

2.3.1. Incident and Problem Management Support (COS OM UC-IM, COS OM CIM-IPM, COS OM BV-IPM) ................................................................. 14

2.3.2. Change Support (COS OM UC-CS, COS OM UCC-CS, COS OM BV-CS) ......... 15

2.3.3. Operations Support Review (COS OM UC-OSR, COS OM UCC-OSR, COS OM BV-OSR) ................................................................. 16

2.4. Knowledge & Learning ...................................................................................................... 17

2.4.1. Remote Knowledge Transfer Session (COS KL UC-KT, COS KL UCC-KT, COS KL CIM-KT) ................................................................. 17

2.4.2. Knowledge Transfer and Mentoring (COS KL BV-KT) ........................................... 18

2.4.3. Cisco Collaboration Modular Knowledge Service (COS KL CMKS) .................... 19

**3. Cisco Business Video Services** ....................................................................................... 19

3.1. BV Architecture Design Review (COS AA BV-ADR) ...................................................... 19

3.2. Event Collaboration Services Readiness Assessment (COS AA BV-ECS RA) ............ 20

3.3. BV Security Assessment (COS AA BV-SECA) ................................................................. 21

3.4. Business Video Strategy and Architecture Alignment (COS OS BV-SAA) .................. 22

3.5. BV TelePresence Analysis and Reporting Service (COS OS BV-TARS) .................... 23

3.6. BV TelePresence Analysis and Reporting Consulting Service (COS OS BV-TARS-C) .... 24

3.7. Business Video Usage & Adoption Consulting (COS OS BV-UAC) ......................... 25

3.8. BV Consulting Support (COS OS BV-CONS) ................................................................. 26

**4. Customer Adoption Services** .......................................................................................... 26

4.1. Collaboration Adoption Assessment (COS AA CCM-A) .................................................. 26

4.2. Collaboration Adoption Analytics Service (COS AA CCM-UAS) ................................... 27

4.3. Collaboration Adoption Strategy and Governance (COS AA CCM-SG) ....................... 27

4.4. Collaboration Adoption Marketing and Communication (COS AA CCM-MKTG) ...... 28

4.5. Collaboration Adoption Training (COS AA CCM-T) ..................................................... 29

4.6. Collaboration Reference Center (COS KL CCM-CRC) .................................................... 29

**5. Conferencing, Instant Messaging, & Social** ................................................................. 30

5.1. SC Community Creation Service (COS OS CIM-CCE) .................................................... 30

5.2. SC Support (COS OM CIM-SCS) .......................................................................................... 30

5.3. CIM Collaboration Performance Review and Recommendation (COS AA CIM-PRR) .... 31

5.4. CIM Subject Matter Expert (COS OS CIM-SME) .............................................................. 32

**6. Customer Collaboration Services** .................................................................................... 33

6.1. UCC Software Recommendation Review (COS AA UCC-PSR) ...................................... 33

6.2. UCC Ongoing Architecture Design Review (COS AA UCC-ADR) ............................... 34

6.3. UCC Finesse Desktop Discovery (COS AA UCC-FDD) .................................................. 34

6.4. UCC Software Risk Analysis (COS AA UCC-SRA) .......................................................... 36

6.5. UCC System Audit (COS AA UCC-SYA) ........................................................................... 36

6.6. UCC Precision Routing Design Review (COS AA UCC-PRDR) ....................................... 37

6.7. UCC Ongoing Scripting Design Review (COS OS UCC-SDR) ......................................... 39

6.8. UCC Reports Discovery (COS OS UCC-RPTD) ............................................................... 40

6.9. UCC Business Consulting (COS OS UCC-CONS) ........................................................ 40

6.10. UCC Custom Engineering Subject Matter Expert Consulting (COS OS UCC–CMSE) ........ 42

6.11. UCC Migration Strategy Planning (COS OS UCC-MIG) ............................................... 44

6.12. UCC Incident Management Support (COS OM UCC-IM) ............................................ 45

6.13. UCC Operations Support Health Check (COS OM UCC-OSR-HC) ............................ 47

**7. Unified Communications Services** ................................................................................. 48

7.1. UC Security Assessment (COS AA UC-SECA) .............................................................. 48
7.2. UC Business Alignment (COS AA UC-BA) ........................................................................................................... 49
7.3. Collaboration Edge Security Audit (COS AA UC-ESA) .......................................................................................... 50
7.4. Program Management Best Practices (COS AA UC-PMO-BP) ................................................................................. 50
7.5. Program Management Gap Analysis (COS AA UC-PMO-GA) .................................................................................. 51
7.6. UC Implementation Support Service (COS OS UC-IS) ............................................................................................ 52
7.7. UC Bulk Automation Support (COS OS UC-BULK) ................................................................................................. 53
7.8. Cisco Collaboration Automation Services (COS OS UC-CAS) .................................................................................. 53
7.9. Program Management Planning (COS OS UC-PMO-PMP) ......................................................................................... 55
7.10. Program Management Consulting (COS AA UC-PMO-PMC) ................................................................................... 56
7.11. UC Operational Runbook Development (COS OM UC-RB) ..................................................................................... 57
1. Services Summary & General Responsibilities

Collaboration Optimization Services includes areas of Audits & Assessments, Optimization Support, Operations Management, and Knowledge & Learning. Collaboration Optimization Services provides remote delivery of Cisco support for one or more of the following families of Cisco’s products:

**Technologies**

- **Unified Communications (UC)**
  - Cisco Unified Communications Manager (CUCM), Cisco Unity Connection, Cisco Unified Presence, Cisco Mobility, Cisco Unified Personal Communicator (CUPC), Cisco Mobile Communicator, Cisco Unified Contact Center Express, Cisco Emergency Responder

- **Customer Collaboration (UCC)**
  - Unified Contact Center Enterprise/Host Editions (UCCE/UCCH), Unified Contact Center ICM (UICM), Unified Customer Voice Portal (UCVP), Unified Interactive Voice Response (IP-IVR), and Cisco Unified Intelligent Center (CUIC) for Unified Contact Center report development

- **Business Video (BV)**
  - Cisco TelePresence

- **Conferencing and Instant Messaging (CIM)**
  - Unified MeetingPlace, Cisco WebEx, Cisco WebEx Connect, and Cisco Jabber

- **Social Collaboration (SC)**
  - Enterprise Social Software including (but not limited to): Cisco WebEx Social, Jive, IBM Connections, MS SharePoint, and Salesforce.com Chatter.

Cisco shall provide the Collaboration Optimization Services described below as selected and detailed on the Purchase Order for which Cisco has been paid the appropriate fee. Cisco shall provide a Quote for Services (“Quote”) setting out the extent of the Services and duration that Cisco shall provide such Services. Cisco shall receive a Purchase Order that references the Quote agreed between the parties and that, additionally, acknowledges and agrees to the terms contained therein.

References to Cisco Collaboration Solution shall mean a solution comprised of Cisco software and Cisco hardware required for one or more of the above Technology(s) as identified in the Quote.

**Cisco Responsibilities**

Cisco shall provide the Collaboration Optimization Services during Standard Business Hours and remotely unless stated otherwise.

The Collaboration Optimization Services are an advising and consultative offering to review Customer’s currently installed and deployed Cisco Collaboration Solution.

Cisco’s Collaboration Optimization Services consists of the provision of Services described below. Cisco shall provide the following General Support provisions for all Services selected by Customer:

**General Cisco Support**

- Designate an engineer (“Cisco Services Engineer”) to act as the primary interface with Customer for its network.
- Schedule with Customer quarterly meetings, up to four (4) visits per year (not to exceed eight (8) days in aggregate), at Customer’s site to review deliverables, activities, and plan for the next quarter. Additional visits will be mutually agreed upon at Cisco’s then-current travel and labor rates.
- Schedule periodic (typically weekly) conference calls to review Customer’s Collaboration Solution status, planning, and the Services provided.
- Make software application tools, tools sets and/or methodologies that facilitate communications (“Collaboration Tools”) available for hosting meetings, managing documentation, instant messaging, desktop sharing, and collaborative spaces.
• Establish a Customer-specific Cisco email alias to facilitate communication with Cisco Services Engineer.

• Provide certain Data Collection Tools Cisco identified as appropriate for Collaboration Solution data collection during the Term of the Services, provided all fees due and owing to Cisco under this Service Description have been paid. Data Collection Tools may or may not include hardware or software. Customer acknowledges and agrees Cisco shall retain full right, title, and interest to the Data Collection Tools. In addition to Cisco provided tools, the Cisco Services Engineer may utilize Customer provided data, scripts, or internal tools to assist in collecting data from the Customer Collaboration solution.

General Customer Responsibilities

In the event that any of these Customer responsibilities are addressed as a part of the service delivery provided by Cisco under an ancillary Cisco service purchased by Customer, then the specific responsibilities described under this Service may not apply.

• Ensure key stakeholders participation with business, engineering and operations personnel during kick off meetings, interviews, workshops and review of findings.

• Provide Cisco with detailed information that describes Customer’s requirements and objectives for its network including but not limited to scalability, security and manageability, roadmap and changes, solution components such as hardware, quantity and software releases.

• Designate at least two (2) but not more than six (6) technical representatives, who must be Customer's employees in a centralized network support center (Customer's Technical Assistance Center), to act as the primary technical interface to the Cisco Services Engineer. Customer will designate as contacts senior engineers with the authority to make any necessary changes to the network configuration. One individual, who is a senior member of management or technical staff, will be designated as Customer’s primary point of contact to manage the implementation of services under this Service Description (e.g., chair the weekly conference calls, assist with prioritization of projects and activities).

• Customer’s TAC shall maintain centralized network management for its network supported under this Service Description, capable of providing Level 1 and Level 2 support.

• Provide reasonable electronic access to Customer’s network to allow the Cisco Services Engineer to provide support.

• If Cisco provides Data Collection Tools or scripts located at Customer’s site, Customer shall ensure that such Data Collection Tools or scripts are located in a secure area, within a network environment protected within a firewall and on a secure Local Area Network (LAN), under lock and key and with access restricted to those Customer employee(s) or contractor(s) who have a need to access the Data Collection Tools and/or a need to know the contents of the output of Data Collection Tools. In the event Data Collection Tool provided by Cisco is Software, Customer agrees to make appropriate computers available and download Software as needed. Customer shall remain responsible for any damage to, loss, or theft of the Data Collection Tools while in Customer’s custody. Customer must immediately return Data Collection Tool(s) to Cisco as instructed by Cisco, upon the earlier of: (i) expiration or termination of the Service Description or (ii) Cisco’s request to Customer that the Data Collection Tool(s) is returned to Cisco.

• Allow services delivered remotely, if for security or other reasons, Customer does not allow installation of data tools, access to relevant databases and server and application configuration tools, then Customer will be responsible for the additional costs related to perform these services onsite at specific sites or locations to perform these services.

• Provide a network topology map, configuration information, and information of new features being implemented as needed.

• In the event the network composition is altered, after the Services selected in this Service Description are in effect, Customer is responsible to notify Cisco in writing within ten days (10) of the change. Cisco may require modifications to the fee if the network composition has increased beyond the original pricing quote for Services.

• Create and manage an internal email alias for communication with Cisco Services Engineer.

• Retain overall responsibility for any business process impact and any process change implementations.

• Provide its designated person(s) with instructions on process and procedure to initiate cases and access the Cisco Services Engineer.

• Notify Cisco of its standard operating procedures related to its business practices, its internal operational nomenclature and network to allow Cisco to effectively communicate and discuss cases with Customer in the context of Customer’s business environment.

• Provide all necessary information to enable Cisco to perform root cause analysis.

• Provide support to Cisco team to collect needed information for performance and optimization services that may or may not use automated tool.
• Inform Cisco of any Cisco Collaboration Solution related project and critical changes that may impact the deployed architecture that will be supported.

1.1. Cisco Unified Communications (UC) Service

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall:

• Provide information on any Cisco Unified Communications (UC) service level agreements
• Provide information on additional Cisco UC applications supported by the solution.
• Identify Customer Cisco UC issues and concerns

1.2. Business Video: TelePresence Analysis and Reporting Support Services (TARS)

The Cisco TelePresence Analysis and Reporting Support Service (TARS) is provided through Cisco TARS Support Service for all support assistance for Customer’s Cisco TelePresence Analysis and Reporting solution. Cisco TAC will not open any Case for TARS; Customer must contact Cisco TARS Support Service directly for support.

Assumptions

• All Services will be provided remotely to Customer locations, unless otherwise agreed in writing by Cisco.
• Customer will be notified by Cisco regarding renewal of TARS up to forty-five (45) days prior expiration date. If Customer does not renew the service, Customer will be responsible for the shutdown and removal of the Data Extraction Software. Cisco will assist Customer with Data Extraction software shutdown and removal.
• Requests for additional creation of specialized report template and training will require a separate pricing and agreement.
• All services will be provided in the English language unless otherwise agreed to by Customer and Cisco.
• TARS requires CUCM (8.5) and TMS (13.x) or higher.
• If Customer desires renewal of the Cisco TelePresence Analysis and Reporting software beyond the initial duration of Services, Customer will be required to access renewal through Cisco sales.
• Customer is responsible for determination of its requirements, and Customer shall retain overall responsibility for any business process impact and any process change implementations.
• All information (including but not limited to: designs, topologies, requirements) provided by Customer is assumed to be up-to-date and valid for the Customer’s current environment. Services described herein are based upon information provided to Cisco by Customer at the time of delivery of the Services.
• Cisco may provide Customer with Software to assist with problem diagnosis and/or resolution. Such Software is the property of Cisco and Customer will be required to return the Software to Cisco promptly upon request.
• Resolution of problems that are diagnosed by Cisco to be enhancement requests or changes by Customer to the TARS system configuration, for which the TARS was developed, will require a separate Statement of Work.

Supplemental Definitions

The following terms, as defined below, apply solely to TARS Software Support Services:

• Bug Fix means any modification or revision to the TAR, other than an Enhancement, that corrects an error or provides other incidental corrections.
• Case means a single support issue and the reasonable effort(s) needed to resolve it such as technical assistance provided by Third Party Partner personnel to Customer regarding questions, clarifications, problems, Bug Fixes, status of Case and escalation of Case with respect to the TAR Software. A single support issue cannot be broken down into subordinate issues. If a Case consists of multiple issues, each subordinate issue shall be considered a separate Case. A Case may require multiple telephone calls and off-line research to achieve final resolution. Cisco has the right to close a Case if Cisco determines: a) the Case is not a problem but an Enhancement request; b) the Case is not a problem but an inherent feature of the product; or c) a workaround was provided for resolution.
• Patch Release: This release contains fixes to software defects that were introduced in any prior Major or content release.
• **Enhancement** means a change, addition or new release, other than Bug Fix to the TAR Software that adds new functions or features, or improves functions or performance by changes to system design.

• **Data Extraction Agent** means software installed within the Customer network environment to extract and send data required for operation of Services.

### 1.3. Conferencing and Instant Messaging (CIM) Service

**Conferencing and Instant Messaging Assumptions**

- Customer will be responsible for coordination and scheduling of each Conferencing and Instant Messaging Solution upgrade with their end user communities.

- Customer will have designated Conferencing and Instant Messaging system administrator(s) available for all post-installation activities.

- Where applicable, Customer’s Site shall be ready prior to the date scheduled for Cisco to perform the Services. Any additional costs incurred by Customer as a result of delays shall be the sole responsibility of the Customer.

- Cisco shall not be liable for any damages resulting from any errors in the network design specifications or any damages caused by the Customer’s implementation of Cisco’s recommendations.

- Cisco shall assume no ownership of the Customer’s network, the network design specifications, and/or their failure to result in a successful implementation.

- In the event that hardware is required for the proper operation of the Software, Customer will purchase the hardware, via a separate agreement, in order to obtain the Software release.

- Customer may, at its discretion, decline to accept a Software release unless the release is required for safety or regulatory compliance.

- Optional features contained in new Software releases may be chargeable if not currently installed on Customer’s system.

- Services for network Infrastructure and network applications other than Conferencing and Instant Messaging Solution (for example, IP Telephony, Content networking, Contact Center, Wireless LAN technologies) is provided under a separate agreement.

Conferencing and Instant Messaging Solution updates are not provided under this Service. Any updates Customer elects to receive will be provided under a separate service contract.
2. Consolidated Services

2.1. Audits and Assessments

2.1.1. Proactive Software Recommendation Report (COS AA UC-PSR, COS AA CIM-PSR, COS AA BV-PSR)

The Proactive Software Recommendation Report Service is a component of the Cisco Collaboration Optimization Service portfolio and is recommended to address Software related areas: Software bugs, field notices, End-of-Life/Support (EoX) releases, Customer Technical Assistance Center (TAC) case increases, network growth, new Customer feature/functionality requests, configuration management problems, new Cisco Software releases, and Software training upgrades. The Service identifies and evaluates the list of open defects present in a Software version that contains features that meet the current and new feature, functionality, and capability requirements of the Customer. The process also assesses how scheduled events such as Hardware and Software upgrades would impact the current Software release level.

The Proactive Software Recommendation Service is available for the one or more of the following technologies as stated in the Customer’s quote:

- Unified Communications (UC)
- Video Collaboration (VC)
- Conferencing and Instant Messaging (CIM)

Cisco Responsibilities

- Obtain the Customer’s Cisco Collaboration Solution Software inventory.
- Gather all the Software information, feature, functionality, and capability requirements from the Customer.
- Evaluate the current and target Software releases for interoperability issues.
- Determine if the current Software releases will support current and target Customer requirements.
- Based on the Customer environment and target feature requirements, articulate a current and target Software strategy by identifying specific releases to achieve the Customer’s objectives.
- Determine the upgrade and patch strategy for the Cisco Collaboration Solution based on the Customer’s operational requirements.
- Create the Proactive Software Recommendation Report based on findings. Depending on the complexity of the environment and the capabilities, the Cisco Services Engineer may:
  - Discuss implementing alternative solution(s)
  - Identify and mitigate risks by providing the Customer with recommendations on system testing, performing testing in the lab when appropriate,
  - Discuss with the Customer field experiences of similar environments.
- Review and submit the Proactive Software Recommendation Report to the Customer for approval.
  - Deliverable: Proactive Software Recommendation Report

Customer Responsibilities

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Designate a single point of contact with availability during Cisco Standard Business Hours to meet with the Cisco Services Engineer to discuss site and system requirements.
- Details of current Software release and Hardware versions for all Cisco Collaboration Solution components.
- High-level architectural drawing showing the locations of all necessary components (i.e., geographical location or location within the network).
- Current and target feature, functionality, and capability requirements including the initial Cisco Collaboration Solution requirement documents, and other relevant information requested by Cisco.
- Commit resources as required by Cisco when needed.
• Review proposed solution or alternative solution(s) for the Customer's issues and provides approval to implement the solution(s).
• Onsite or remote access to network devices related to any proposed and agreed upon Software upgrade.
• Review and approve the Proactive Software Recommendation Report.

2.1.2. Stability Audit (COS AA UC-SA, COS AA BV-SA, COS AA CIM-SA)

The Stability Audit Service involves the collection and analysis of several areas of the Customer's network, including infrastructure design, device health, Hardware, Software versions, and application-specific configuration based upon adherence to Cisco leading practices for Collaboration deployments. The process will identify deficiencies and potential risks within the system(s) that should be resolved to reach a stable environment based on Cisco and industry best practices and known working models.

The Stability Audit Service is available for the one or more of the following technologies as stated in the Customer's quote:

- Unified Communications (UC)
- Conferencing and Instant Messaging (CIM)
- Business Video (BV)

Cisco Responsibilities

- Conduct interviews on-site or remotely with various administrative and operations personnel for information gathering, analysis of gathered information and determination of proper Software levels and recommended configuration changes.
- Gather Cisco Collaboration Solution Software configuration data via Cisco Unified Communications Audit Tool (UCAT), third-party tools and/or Stability Audit worksheet.
- Gather a complete inventory of the current network infrastructure.
- Obtain tools from the Cisco Unified Communications Management Suite, if necessary.
- Analyze information and data collected and create a Stability Audit Report identifying potential deficiencies and Software and/or configuration recommendations, based on Cisco leading practices.
- Submit and review findings and recommendations of the Stability Audit Report with the Customer for approval.
- If Customer includes the Business Video (BV) solution component, in addition to the above responsibilities, Cisco may:
  - Include the following: Codec configuration, CUCM server Hardware and Software configuration, CTS-MAN configuration, CTMS configuration and meeting statistics, SLA analysis for optimized location of CTMS in the network, and component redundancy analysis and configuration
  - Capture information through examination of network components along TP PATH and data, identify deficiencies based on analysis of that data
  - Deliverable: Stability Audit Report

Customer Responsibilities

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Customer’s Operations Engineer provides access to the network environment including access to inventory and documented network information as well as approved diagnostic equipment connections for information gathering.
- Approval from Customer to deploy Cisco and/or third-party tools for network discovery, inventory and performance data gathering as necessary.
- Security exemption to utilize any Cisco or third-party software on their network for the use of data inventory gathering, performance.
- Customer acknowledges and declares stability problems (if any exist), recent network outages and Cisco Technical Assistance Center (TAC) case escalations.
- Submit to Cisco a detailed network topology diagram, network inventory and discovery reports and performance statistics or reports, and complete inventory of the existing Cisco environment as stated in Customer Quote (if available).
- Submit a list of participants to be interviewed by Cisco regarding the audit, Customer should provide their job title and responsibility within the organization.
- Notification of any delay in scheduled changes in the network during the audit process.
- Review, approve, and execute recommendations documented in the Stability Audit Report.
2.1.3. **Software Security Alert (COS AA UC-SSA, COS AA CIM-SSA, COS AA BV-SSA)**

The Software Security Alert service will provide proactive analysis of Cisco generated security advisories (PSIRTs). If security issues are uncovered that may impact the Customer’s Collaboration Solution in which Cisco products operate, Cisco will recommend action(s) to protect the Cisco Collaboration Solution from potential issues.

The Software Security Alert Service is available for the one or more of the following technologies as stated in the Customer’s quote:

- Unified Communications (UC)
- Video Collaboration (VC)
- Conferencing and Instant Messaging (CIM)

**Cisco Responsibilities**

- Perform an analysis on Cisco PSIRT notifications and how these may impact the Customer’s solution.
- Depending on the proposed PSIRT resolution, Cisco Services Engineer may:
  - Help the Customer with recommendations on the type of appropriate testing the Customer should perform.
  - Review similar environments and correlate features and code.

  **Deliverable: Software Security Alert Report**

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Details of its current Software release and Hardware version for Cisco Collaboration Solution components purchased
- High-level architectural drawing that shows where components are located (for example, geographical location or location within the Network).
- Current and target feature/functionality and capability requirements including the initial Cisco design requirements documents.
- Review proposed solution or workaround for the Customer’s issues and provides approval to implement the solution(s).
- On-site and/or remote access to network devices related to the issue. If onsite is required, Customer will pay for expenses for Cisco personnel.
- Review the recommendations as stated in the Software Security Alert Report

2.2. **Optimization Support**

2.2.1. **Ongoing Design Support (COS OS UC-OS, COS OS CIM-OS, COS OS BV-OS)**

The Ongoing Design Support Service evaluates the Customer’s existing design collateral based on published best practices and industry standards. The Ongoing Design Support Service assists the Customer in overcoming many common practical and technical challenges involved in Cisco Collaboration Solution service expansion.

The Ongoing Design Support Service is available for the one or more of the following technologies as stated in the Customer’s quote:

- Unified Communications (UC)
- Business Video (BV)
- Conferencing and Instant Messaging (CIM)

**Cisco Responsibilities**

- Schedule with the Customer meeting times with stakeholders to discuss detailed site-specific technical and application inquiries, including consultation on feature capabilities, and Customer’s rollout of new features and functionality released in updates made available by Cisco under a separate support contract.
- Review with Customer’s participants the following during interviews and or meetings:
  - Short-term and long-term business goals.
  - Customer’s Cisco Collaboration Solution and Network infrastructure design.
• Analysis of documented feature and functionality requirements as well as business direction compared against current design and needs.
  • Feature and functionality requirements
  • Current system capacity and future capacity growth plan(s)
  • Potential impacts to Customer’s Cisco Collaboration Solution environment.
  • Protocol and dial plan design(s).

• Perform a comprehensive review for each site model in multi-site deployments
• Discuss Hardware and Software needed to accommodate the growth, issues related to EoX of components, and guidance and configuration directives for installing any new Hardware or Software.
• Provide installation guidance and configuration directives for installing any new Hardware and Software.
• Review the Customer’s step-by-step plan, provided by third-party implementation partners, to address the stated growth, while mitigating potential issues.
• Review the Customer’s design documents, feature functionality requirements, application security, change control process, and business plans.
• Provide ongoing design consultative support for any new site or feature, increased capacity, or addition of Cisco Collaboration Solution applications that may impact the existing design.
• When applicable, the following will be provided for federation services:
  • Review with Customer the federation requirements (security, interoperability, routing, policies, internal and external domains, third party platforms, etc.)
  • Manage federation portal based on Customer’s federation requirements
  • Provide reporting capabilities for tracking usage and other metrics

**Customer Responsibilities**

*In addition to the General Customer Responsibilities, Customer shall provide the following:*

• Schedule meeting and/or interviews for Cisco to discuss detailed site-specific technical and application inquiries.
• Provide access to all network documentation.
• Provide on-site and/or remote access to the network devices included in the design review.
• Update the Solution and Site-Model Specific Acceptance Test Plan, post-cutover Day 2 support Plan, and Detailed Design as recommended by Cisco.
• Implement Cisco Collaboration design changes and acceptance testing.
• When applicable, provide Cisco with federation service requirements and submit to Cisco changes requested:
  • Provision UC platform via the federation portal provided.
  • Provide contact details at the federation partner for account generation.

### 2.2.2. Remote Upgrade Support (COS OS BV-RU, COS OS CIM-RU)

The Remote Upgrade Support Service works with Customer to create an Upgrade Plan that will be used by Customer in performing a Software upgrade of Customer’s existing Cisco Collaboration Solution. Cisco will help Customer define a proper escalation path that Customer will use, when necessary, in resolving cases or issues. A Cisco Services Engineer will be available to provide guidance and direction to Customer during predefined maintenance windows. The Remote Upgrade Support Service will be delivered remotely, and no on-site assistance will be provided.

The Remote Upgrade Support Service is available for the one or more of the following technologies as stated in the Customer’s quote:

• Business Video (BV)
• Conferencing and Instant Messaging (CIM)

**Cisco Responsibilities**

• Provide an Upgrade Management Plan that may include the following items:
• Step-by-step written procedures for Hardware and Software updates, upgrades, and/or modifications. The procedure will be customized to specific Customer requirements and to the component being upgraded.
• Provide an estimated amount of time required to perform the upgrades.
• Work with Customer to provide relevant data points for any change management maintenance windows that need to be scheduled or processed.
• Document all running versions of all dependent products.
• Inventory of all operations and running application to verify they were working as anticipated.
• Create an Acceptance Test Plan based on the type of updates, upgrades, and/or modifications for Customer sign off.
• Identify and recommend any new parameters per Customer requirements in the related Software.
• Provide a Upgrade Contingency Plan.
  • Cisco references all releases to confirm no bug related issues have been found.
  • Cisco will define an escalation path with Customer based on Severity level(s), in order for Cisco Services Engineer to assist Customer and Cisco TAC with resolving the case, if needed.
  • Cisco Services Engineer will be available remotely to provide the guidance and direction in support of Customer performing changes to Customer environment during predetermined maintenance window(s). Customer must schedule 21 days in advance.
  • Work with Customer to assist in validating the functionality after the upgrade and assist TAC/RMS in troubleshooting any issues.
  • Cisco will not perform any changes or modifications to Customer environment.

  ○ Deliverables: Upgrade Management Plan Report, Upgrade Contingency Plan, and Acceptance Test Plan

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:
• Provide primary and secondary contacts throughout the upgrade project planning.
• Provide IT implementation contact and resource commitment.
• Ensure any LAN/WAN or other engineering team contacts are identified and available if access to devices is needed for troubleshooting or upgrade assistance.
• Provide Cisco with validation of recent backup and access to backed up configurations/images.
• Provide onsite/remote access to network devices if required.
• Ensure maintenance windows have been approved, and comply with the estimated time the Cisco Services Engineer has recommended. Provide Cisco with most recent network design.
• Perform necessary changes to Customer environment, with guidance from Cisco.
• Assist with post-upgrade validation and testing.

2.2.3. Collaboration Optimization Remediation Service (COS OS UC-ORS)

The Collaboration Optimization Remediation Service will make changes to Customer’s Collaboration Solution based on exceptions and recommendations from the Stability Audit service. This service leverages the foundational elements of COS including Stability Audits for Unified Communications, Contact Center and Business Video. Cisco will perform the remediation of the exceptions using Cisco AS Collaboration Tools, workflow process automation, and manual intervention to implement the corresponding configuration changes.

The Collaboration Optimization Remediation Service employs Cisco’s powerful orchestration platform to provide a workflow that is built based on Cisco and Customer IT best practices and operational guidelines. A Cisco Services Engineer will evaluate the impact of these changes, send the notification for approval to perform remediation, and execute the changes upon approval. These changes are required to optimize Customer’s Collaboration Solution leveraging automation tools and Cisco AS expertise to maintain the security and stability of mission critical applications.

Cisco will deploy tools to enable the Cisco Optimization Remediation Service. These tools have the ability, if enabled, to collect data from the customer network, store data and generate reports, provide customer IT admin interface, and implement remediation items.
These tools communicate with the Cisco Data Center for policy, rules and other proprietary Cisco content. Activating Cisco Optimization Remediation Services typically requires these tools to be placed at a customer Hub or HQ location.

These tools will be used to execute the primary remediation configuration management functionality inclusive of the Optimization Remediation Services as described in this document.

Cisco Responsibilities

- **Ongoing Consultation and Remediation**
  - Review exceptions identified by Cisco AS Collaboration Tools identified as part of this platform
  - Analyze impact of changes to Customer’s Collaboration Solution
  - Review with Customer the list of exceptions to be remediated using Cisco AS Collaboration Tools and workflow automation processes
  - Send Customer notification of all exceptions to be remediated for approval
  - Once approval is received, Cisco will execute scripts and workflows to schedule change management process and implementation of changes
  - Review with Customer exceptions that require manual intervention and analyze impact of changes to Customer’s Collaboration Solution
  - Send Customer notification of exceptions requiring manual intervention for approval
  - Once approval is received, Cisco will work with Customer’s change management process and implement changes required using Cisco best practices
  - Develop Collaboration Optimization Remediation Report that includes all exceptions found, changes that were made to remediate exceptions, and any issues encountered during remediation process
  - Submit and review findings of the Collaboration Optimization Remediation Report with the Customer for approval

- **Deliverable:** Collaboration Optimization Remediation Report

Customer Responsibilities

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Submit a list of participants to be interviewed by Cisco, Customer should provide their job title and responsibility within the organization.
- Attend meetings as required by Cisco and agreed upon by Cisco and Customer
- Provide access to the network environment including access to inventory and documented network information as well as approved diagnostic equipment connections for information gathering.
- Provide security exemption to utilize Cisco AS Collaboration Tools on their network for the use of data inventory gathering, performance.
- Provide Cisco a listing of all customizations and integrations in Customer’s Collaboration Solution environment
- Submit to Cisco a detailed network topology diagram, network inventory and discovery reports and performance statistics or reports, and complete inventory of the existing Collaboration Solution
- Provide approval to Cisco for deployment of Cisco AS Collaboration Tools for network discovery, inventory, performance data gathering, workflow process, and change management as necessary.
- Review with Cisco steps required to implement Cisco AS Collaboration Tools and any customization work required
- Work with Cisco to install and configure Cisco AS Collaboration Tools
- Provide notification of any delay in scheduled changes in the network during the remediation process.
- Review and approve notifications of exceptions to be remediated by Cisco
- Review and approve the Collaboration Optimization Remediation Report

2.2.4. Validation-Test Cycle and Review - Standard (COS OS VT)
Cisco will consult with Customer via a series of meetings to develop a thorough understanding of Customer’s solution testing goals and requirements, and generate a proposed Test Plan. Once agreed, Cisco will execute the tests documented in the Test Plan and report findings to Customer.

**Cisco Responsibilities**

- Review of Customer's testing goals and business objectives for the solution;
- Analysis of requirements such as software strategy, platforms, topology, protocols, and configurations
- Test Plan development or review/refine existing test plan;
- Schedule facilities, equipment and resources;
- Test Set Up – Perform the Physical Lab Setup;
- Test Execution – Execute the Test Plan; and,
- Test Results Analysis – Document the results in a Test Report.
- Validation-Test Cycle and Review - Standard Support is estimated to last between 8 to 12 weeks.
- Validation and Testing Support is only available to certain geographic locations and will be specified in the Quote for Services.

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Provide the low level design document describing how Customer Network needs to be built and engineered to meet a specific set of technical requirements and design goals. The level of details must be sufficient to be used as input to an implementation plan.
- Ensure key detailed design stakeholders and decision-makers are available to participate during the course of the service.
- Provide or extract additional information required in the design effort (e.g., current and planned traffic characteristics).
- Information on Customer business and technical requirements for new Software releases.
- Review details of planned changes with Validation and Test Engineer.
- Information on Customer certification process and lab testing process.
- Information on Customer change control process.
- Information on any service level agreements or Network performance requirements.
- Information on critical applications supported by the Network.
- Information on which applications are mission-critical and their priority schemes.
- Information on expected Network growth and application mix changes.
- Information on any future advanced technology implementations.

### 2.3. Operations Management

#### 2.3.1. Incident and Problem Management Support (COS OM UC-IM, COS OM CIM-IPM, COS OM BV-IPM)

The Incident and Problem Management Support Service provides proactive building blocks to enhance an existing Customer Incident and Problem Management process by enabling key serviceability tools and applying leading practice configurations in the Customers Cisco Collaboration Solution environment.

The Incident and Problem Management Support Service is available for the one or more of the following technologies as stated in the Customer’s quote:

- Unified Communications (UC)
- Conferencing and Instant Messaging (CIM)
- Business Video (BV)
• Provide serviceability best practices to be implemented in the Customer’s Collaboration Solution environment such as trace and alarm configurations, daily system health reporting, and weekly performance trend analysis
• Assist Customer with Cisco Technical Assistance Center (“TAC”) escalation after following the proper Cisco TAC procedures and proper escalation process.
• Collaborate with Cisco TAC regarding the Customer’s Collaboration environment to assist Cisco TAC and the appropriate Cisco Business Unit(s) in resolving the incident.
• Cisco Project Manager will assign an engineer to remotely track and help with the resolution of the issue(s) related Cisco Collaboration components only.
• Assist Customer with remote support in dealing with open P1 and P2 cases. Cisco will monitor, assist and escalate when necessary to help resolve these issues. Cisco TAC is responsible for the case.
• Assist the Customer in analyzing recurring problem(s) and root cause(s) including consultative support for development of a plan of action to prevent, address, and minimize the business impact of the problem(s)
• Cisco TAC is responsible for the case, including resolution and closure of problem/case.

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:

• Customer Service Desk will provide a single point of contact
• Cisco access to users that have been contacting the Customer’s support desk or resolution center for assistance in connection with the Cisco Collaboration components or service problems or issues.
• Open a ticket and perform diagnostics with Cisco TAC prior to contacting Cisco Services for support.
• Notify Cisco Services of the open ticket needing assistance and provide Cisco TAC case number
• Customer shall not escalate any related problems or issues until Cisco TAC has performed diagnostics.
• Customer will work with Cisco TAC on the resolution and closure of problem/case.
• Customer understands and acknowledges that the following are not provided or a part of the Incident and Problem Management Support Service:
  • Cisco Advanced Services Engineer does not make any changes to the Customer production environment.
  • P3/P4 Cisco TAC cases.
  • Onsite presence for Cisco TAC case support.
  • Incident and Problem Management Support does not replace Cisco TAC Support services.

2.3.2. Change Support (COS OM UC-CS, COS OM UCC-CS, COS OM BV-CS)

Collaboration Optimization Services component Change Support provides remote assistance to Customer during pre-scheduled change management windows to institute any major upgrades or changes noted to stabilize the Cisco Collaboration environment that Customer elects to perform. No onsite assistance provided under the Change Support, and any request to perform such is subject to Cisco’s sole discretion and Customer will responsible for any costs associated with such onsite visit.

The Change Support Service is available for the one or more of the following technologies as stated in the Customer’s quote:

• Unified Communications (UC)
• Customer Collaboration (UCC)
• Business Video (BV)

Cisco Responsibilities

• Review Method of Procedure (MOP) documents prepared by Customer.
• Provide recommended changes to the MOP based on best practices for implementing, testing and/or backing out the planned change.
• Participate in any post-change reviews or post mortems to assist with the continuous improvement of Customer’s change management process.
• Cisco will not perform any changes or modifications to Customer environment.
Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:

- Prepare the MOP document, which will include the steps required to prepare for, execute, test and back out the change.
- Participate in a collaborative review of the MOP with the Cisco Services Engineer.
- Review the proposed solution or workaround for the Customer's issues and provides approval to implement the solution(s).
- Access to any information required by Cisco Technical Assistance Center (Cisco TAC) to troubleshoot and resolve the issues.
- Submit description of the problem and systems (only one problem description per service request)
- Identify status of current and past Customer issues that might help resolve the case.
- Onsite/remote access to the network devices related to the issue.
- Schedule and commit resources to resolve the situation as needed.
- Conduct post-change review to discuss continuous change management process improvements.
- Perform necessary changes to Customer environment, with guidance from Cisco.

2.3.3. Operations Support Review (COS OM UC-OSR, COS OM UCC-OSR, COS OM BV-OSR)

The Operations Support Review identifies the operational support activities and process required to manage a Cisco Collaboration Solution environment. The Operations Support Review assessment focuses on the following eleven operations processes: Day 2 activities, staffing and education, incident management, configuration management, availability management, service continuity management, change management, problem management, capacity management, service level management and service desk.

Cisco will conduct discovery, interview and workshop sessions with Customer’s support staff, operations process owners and other IT stakeholders to identify current support process and procedures. The Operations Support Review establishes an operations support maturity level of each of the eleven operations process based on Customer provided documentation and information gathered through the interview and workshop sessions. The Operations Support Document outlines gaps and recommendations to support a Cisco Collaboration Solution based upon a Customer’s operational environment.

The Operations Support Review service is available for the one or more of the following technologies as stated in the Customer’s quote:

- Unified Communications (UC)
- Customer Collaboration (UCC)
- Business Video (BV)

Cisco Responsibilities

- Contact Customer to identify the type of Customer personnel required to participate in the interviews and workshops.
- Schedule time to conduct meeting to review the Operations Support Questionnaire.
- Send the Customer the Operations Support Questionnaire for completion and request specific documents required to assess Customer’s operational readiness.
- Review Customer provided questionnaire and requested documentation and document preliminary findings.
- Conduct interviews with Customer’s support organizations to obtain additional information required for preliminary Operations Support Review Report document.
- Conduct the Operations Support Review Workshop to review assessment findings and recommendations.
  - Review Support Evaluation findings
  - Discuss Customer’s current operations processes and tools usage
  - Provide recommendations of key operations, engineering, tools, and process requirements and discuss gaps identified to support a Cisco Collaboration Solution environment as well as options for Customer to support leading practices.
  - Document the Operations Support Plan resulting from Operation Workshop findings as a framework to improve Customer’s operational capabilities.
  - Present and review the Operations Support Review Report findings with the Customer.
o Deliverable: Operation Support Review Report

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:

• The level of commitment and collaboration is critical to the success and value of the engagement. The ability of Cisco staff to accurately assess the current operations environment and provide recommendations is dependent on the amount and accuracy of the data provided as well as the level of participation in the items listed below.
• Schedule attendees for the pre-kick off conference call, Interview Sessions and Workshop.
• Collecting documentation and other Information collection as requested by Cisco.
• Completed Operations Support Questionnaire; identify key individuals who will participate in the pre-kick off conference call; identify support personnel to be interviewed; and identify key individuals who will attend the Operations Support Workshop.
• Review of the completed deliverable and recommended changes.
• Schedule a meeting with Cisco and Customer participating support personnel thirty (30) business days from presenting Operations Support Review Report to review implemented changes as defined in the Operations Support Review Report.

2.4. Knowledge & Learning

2.4.1. Remote Knowledge Transfer Session (COS KL UC-KT, COS KL UCC-KT, COS KL CIM-KT)

The Remote Knowledge Transfer Session component of the Cisco Collaboration Optimization Service (COS) allows the Cisco Services Engineer to have direct and interactive communication with the Customer. Based on intimate knowledge of the Customer deployment, Cisco Services Engineer will deliver training based on Customer specific needs which may include whiteboard sessions, virtual web conferencing sessions, or transfer of information tailored to the Customers’ needs to make the training most effective. Knowledge transfers are typically delivered based on a specific number of sessions as specified in the Customer’s Quote.

Knowledge transfers are not to replace any authorized Cisco AS Education classes. The Remote Knowledge Transfer Service is available for the one or more of the following technologies as stated in the Customer’s quote:

• Unified Communications (UC)
• Conferencing and Instant Messaging (CIM)
• Customer Collaboration (UCC)
• Cisco Social Collaboration

Cisco Responsibilities

• Deliver high-level technical sessions.
• Identify with the Customer the session subjects (Collaboration Applications and Technologies to be included) at least 45 business days in advance. The following are suggested topics:
  • Use of current product features and capabilities,
  • Administration best practices,
  • Operational best practices,
  • Optimal use of new features and capabilities,
  • Integration of any Cisco Collaboration Applications required.
• In addition to the above, Customers with Customer Collaboration (Unified Contact Center) Knowledge Transfer Optimization Service can include the following:
  • Integration of Cisco Unified Contact Center components,
  • High level discussion of 3rd party contact center applications,
  • Troubleshooting techniques and other topics as defined between Cisco and Customer.

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:

• Customer’s primary contact is responsible for collecting the training requirements and providing them to the Cisco Services engineer.
• Coordinate and schedule Knowledge Transfer sessions with a Cisco Collaboration Project Manager at the beginning of each quarter.
• Coordinate with Cisco Collaboration Project Manager on Knowledge Transfer topics covered during the transfer and mentoring session.
• Participate in pre-knowledge transfer conference call(s) to enable Cisco to deliver a more focused and tailored session.
• Submit to Cisco background information on the skill sets of the attendees.
• Customer understands that the Knowledge Transfer sessions will be performed remotely. If scheduled at a Customer’s site, Customer will be responsible for the additional costs.
• If applicable, schedule facilities and equipment required for each session.
• Notify Cisco Collaboration Project Manager with not less than three (3) weeks prior notice of changing topic of session.
• Customer must provide Cisco Collaboration Project Manager at least ten (10) days’ notice of cancellation or reschedule of training or mentoring session. No notice or less than ten (10) days’ notice will forfeit the session.
• Attendees should have knowledge of Cisco Collaboration products related to the Customer’s solution.
• The maximum number of students at any one time shall not exceed ten (10), unless mutually agreed upon by the Customer and Cisco.
• Cisco Customer Collaboration (UCC) Knowledge Transfer Service session topics will include IPT and CallManager discussions relates directly to a Unified Contact Center solution.
• Cisco Customer Collaboration (UCC) Knowledge Transfer sessions will not cover the following topic: third-party applications, solutions and integration and agent/supervisor /administrator training.
• Cisco Social Collaboration Knowledge Transfer sessions will not cover third-party applications, solutions and integration.

2.4.2. Knowledge Transfer and Mentoring (COS KL BV-KT)

The Knowledge Transfer and Mentoring service component of Collaboration Optimization Services allows the Cisco Services Engineer to have direct and interactive communication with the Customer. Based on intimate knowledge of the Customer’s business requirements and deployed architecture, the Cisco Services Engineer may develop customized informal training material or topics of interest tailored to the Customer’s need. This knowledge transfer is not meant to replace any authorized Cisco classes.

The Knowledge Transfer and Mentoring Service is available for the one or more of the following technologies as stated in the Customer’s quote:

• Business Video (BV)

Cisco Responsibility

• Schedule and conduct an annual technical update meetings and/or mentoring services for Customer’s personnel, based on a specific number of sessions as contracted.
• Cisco and Customer will jointly determine an appropriate format and delivery method that may include but shall not be limited to using a shared medium via the Internet, teleconference, and/or onsite.
• The maximum number of attendees at any one time shall not exceed ten (10).

Customer Responsibility

In addition to the General Customer Responsibilities, Customer shall provide the following:

• Notify Cisco with not less than three (3) weeks prior written notice of a training or mentoring requirement where the delivery of the training or mentoring is to be in a classroom whether or not based at Cisco’s or Customer’s facility.
• Customer’s personnel attending any training or mentoring session must meet pre-requisites notified by Cisco to Customer.
• Participate in pre-training or pre-mentoring conference call in the event Cisco determines that further information about Customer’s requirements is needed to enable Cisco to deliver a more focused and tailored training or mentoring session
• Adequate facility capable of supporting training or mentoring sessions and provide resources necessary to support such sessions
• Must give Cisco Project Manager at least ten (10) days’ notice of cancellation or reschedule of training or mentoring session. No notice or less than ten (10) days’ notice will forfeit the session.
2.4.3. **Cisco Collaboration Modular Knowledge Service (COS KL CMKS)**

The Cisco Collaboration Modular Knowledge Service (MKS) is a subscription-based access to Cisco’s leading best practices and technical knowledge in collaboration products and technologies. The service provides end-users with access to valuable Cisco intellectual property, Collaboration MKS to help end-users avoid common problems and reduce their learning curve. Collaboration MKS enables IT professionals in charge of today’s networks to quickly locate the technical and operational guidance they need by drilling down to relevant sub-folders with design tips, methodologies, leading practices, and foundational concepts. The MKS library is made available by Cisco through a secure web-based portal. In addition to the Collaboration products and technologies included in this service, Customer will also be provided with access to the foundational Network Infrastructure Modular Knowledge Service at no additional charge.

**Cisco Responsibilities**

- Assist Customer in account creation for the Portal. Customer is responsible for security, network connection, IP address assignment and any required firewall or Access Control List changes required on Customer’s network in order for the end-users to access the "Portal".
- Conduct a training session to Customer point(s) of contact for the authorized viewers
- Hold a “Demo Day” to train and demonstrate the tool for Customer’s authorized viewers.
- Host content and provide preventative maintenance in accordance with Cisco’s normal maintenance schedules and procedures.
- Troubleshoot technical issues related to the portal (submit to tkl-support@cisco.com).
- Provide technical assistance to Customer as Cisco may deem necessary to properly provide the Services.
- Updated content: Cisco may revise, update and/or remove previously-released Multimedia Clips and/or Sidebar Content ("Updated Content"). Cisco will make any updated content available to Customer as a part of the Services. The updated content will exclude the previously-released Multimedia Clips and Sidebar Content (where applicable) that the updated content was intended to supersede.

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

- On-boarding information as follows: contact name, title, address, telephone number, e-mail address of primary and secondary team lead, Email ids and name of the authorized viewers who will need access to the "Portal".
- Install the DRM Software on as needed basis, which allows the viewing of DRM-protected content on the "Portal".
- Participate in training and/or feedback sessions with Cisco team to enable Cisco to understand the needs of the authorized Viewers for the "Portal"
- Discontinue any use of the superseded Multimedia Clips and/or Sidebar Content after updated content becomes available.
- Notify Cisco of any technical support requests or troubleshooting issues related to the Services by sending an e-mail to Cisco team at tkl-support@cisco.com

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3. **Cisco Business Video Services**

3.1. **BV Architecture Design Review (COS AA BV-ADR)**

The Business Video (BV) Architecture Design Review service component will provide Customer with a reference architecture “blueprint” to use as a baseline, for seamless and consistent Business Video deployments. Cisco will provide updates annually to the Business Video Architecture Design Report based on the quote of the Service.

**Cisco Responsibilities**

- Work with Customer to gather high level business and technical (feature and functional) requirements.
- Create the high-level reference architecture baseline for Business Video.
• Gather requirements through interviews and relevant documentation reviews to understand current business and collaboration initiatives such as; Call control, feature and functionality requirements including dial plan architecture requirements.

• Compare functional requirements with the available features/functionality of the product to any video conferencing solution that might currently exist in the Customer’s environment.

• Create the Business Video Architecture Design Review Report providing an assessment with recommendation on the Customer’s enterprise video architecture based upon the business requirement and Customer’s strategy which may include:
  • Scalability (CallManager)
  • Interoperability (Tandberg, Polycom)
  • Desktop Video

• Present the Business Video Architecture Design Review Report findings and recommendations to the Customer for approval.
  o Deliverable: Architecture Design Review Report

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:

• Designate a Customer subject matter expert with knowledge of the Customer’s environment/business requirements and the authority to access the required information

• Schedule key detailed design stakeholders and decision-makers to participate during the interview process.

• Submit to Cisco with current network topology (Business Video, telephony components and network infrastructure).

• Notify Cisco of any Business Video and Unified Communications changes that may impact the network

• Submit to Cisco requested information within 5 business days

• Representative with authority to interface with the vendors that the Customer has chosen

• Understand that the Business Video Architecture Review will be performed remotely.

• Understands and acknowledges that the following are not covered or a part of the Business Video Architecture Review service:
  • Network and Unified Communication Hardware, Software and network architectures.
  • Unified Contact Center Hardware, Software and network architecture

• Review and approve the Business Video Architecture Design Review Report findings and recommendations.

3.2. Event Collaboration Services Readiness Assessment (COS AA BV-ECS RA)

The Event Collaboration Services (ECS) Readiness Assessment assists Customer in identifying requirements and gaps for enabling an enhanced, high-quality, and reliable video streaming experience. The ECS Readiness Assessment will support WebEx Events, Webcasting, and Virtual Event environments through an assessment of Customer’s network, project management, video streaming capabilities, and content delivery network (CDN) integrations (i.e. TelePresence Content Server (TCS), Enterprise Content Delivery System (eCDS), Show and Share (SnS), etc.).

Cisco Responsibilities

• Work with Customer to gather high level business and technical (feature and functional) requirements.

• Create the high-level reference architecture baseline for ECS.

• Gather requirements through interviews and relevant documentation reviews to understand current business and collaboration initiatives such as: CDN, integration with existing collaboration technologies (i.e. Business Video, TCS, SnS, etc.)

• Identify gaps comparing Customer requirements and ECS solution, and provide recommendation to fill the gap

• Create a detailed ECS Readiness Assessment Report addressing gaps and providing overall recommendation

• Present the ECS Readiness Assessment Report to the Customer
  o Deliverable: Event Collaboration Services Readiness Assessment Report

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:

- Designate a Customer subject matter expert with knowledge of the Customer’s environment/business requirements and the authority to access the required information
- Schedule meetings with key detailed design stakeholders and decision-makers to participate during the interview process.
- Provide Cisco with current network topology (network infrastructure, QoS, Firewall, video streaming architecture, etc.)
- Notify Cisco of any risks/challenges that may impact the network
- Provide Cisco with requested information as needed

3.3. **BV Security Assessment (COS AA BV-SECA)**

The BV Security Assessment provides Customer with the most current BV architecture security implementation as compared with Cisco’s BV security best practices and provides Customer with a BV Security Assessment report. Cisco will perform proactive analysis of the security advisories (PSIRTs) that Cisco generates when security issues are uncovered that may impact networks in which Cisco products operates, and provides Customer with necessary actions and recommendations to repair and/or protect the network from these issues. Cisco will provide an analysis of the vulnerability and its resolution with regard to its possible impact on the Customer’s TelePresence and Business Video solution.

**Cisco Responsibilities**

- Obtain Customer’s up-to-date Business Video infrastructure topology diagrams along with configurations of BV devices.
- Interview and capture Customer’s Business Video security requirements.
- Obtain documentation on high and low-level design of Business Video infrastructure.
- Request network access for Cisco Collaboration Tools to collect Business Video device configuration.
- Gather configuration of all video components utilizing Cisco Collaboration Tools.
- Verify the Customer’s selected endpoints and their security concerns.
- Confirm Business Video application servers and its hosting location along with Customer security concerns.
- Validate video solution deployment model (physical and logical) and any security requirements.
- Verify any video federated connections or business-to-business applications running in the network.
- Verify PSTN (SIP) trunks and security methods applied.
- Perform gap analysis based on video component configuration and collected data against Cisco’s video security best practices and Customer’s requirements.
- Review existing Cisco Proactive Security Alerts for all Business Video components.
- Perform analysis of all video PSIRT notifications and any impact they may have on the video communications solution.
- Identify and document any changes necessary and considered system affecting.
- Depending on the proposed PSIRT resolution, Cisco Services Engineer may:
  - Provide recommendations for preparing for PSIRT application.
  - Provide steps to follow to enable testing of the PSIRT in the Customer’s lab/production environment.
- Present the BV Security Assessment Executive Summary Report with a summary of strengths and weaknesses of the BV Security Architectures.

  **Deliverable:** BV Security Assessment Executive Summary Report

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Provide up-to-date BV infrastructure topology diagrams and information about the current video architecture, configuration of video devices, and security policies.
- Provide physical and logical network schematics for existing Network infrastructure.
• Provide documentation that defines the current network topology, including access, distribution, and core layers, types of switches and routers in each layer, IP addressing and sub-netting for each layer, and security features/services that have been enabled on the Network.

• Identify Customer stakeholders for compiling specific video, network and any call control security requirements and make the identified persons available for interviews as and when required by Cisco.

• Provide documented voice and network security requirements (business and technical) including any Business Video High Level Design and Low Level Detailed Design (if available), Data Network architecture design specifications and the current BV and Network security policy, and state of implementation (as applicable).

• Provide documentation that defines the existing video traffic flows and video network topology.

• Provide data networking configurations for core routing protocols, LAN/WAN connectivity, firewalling and access control lists.

• Provide access to the existing network devices; (as required)

• Provide remote access to the network where feasible.

• Customer will ensure that no major changes are made to the video infrastructure while Security Assessment is in progress.

• Provide timely answers to all the questions asked during the interview process.

• Ensure that the appropriate staff members are involved from Customer site and co-ordinate internal resources for all meetings.

3.4. Business Video Strategy and Architecture Alignment (COS OS BV–SAA)

The Business Video (BV) Strategy and Architecture Alignment Service gathers information related to Customer current and planned business video service, Cisco will work with the Customer through workshop and interviews to develop Business Video Strategy Executive Readout Report; this report includes: ROI Use cases, a Use Case Prioritization Matrix, and a Business Video Roadmap capabilities

Cisco Responsibilities

• Create a draft strategy questionnaire which shall form the basis for gathering information from Customer during the discovery workshop and interview meetings.

• Coordinate with Customer on scheduling Customer interviews with nominated Customer business functions as stated in the Customer quote. Identify and document Customer’s current and future video capabilities.

• Conduct the interviews with Customer designated technology and business stakeholders to collect information on short and long term technology strategy, future business goals and objectives and other pertinent information necessary to define up to five (5) prioritized use cases with five (5) year models, Analyze Customer business and technical requirements; and, develop a baseline of current and planned video infrastructure and video system components, including documenting the Customer’s planned video system components and challenges.

• Create a Business Video Strategy Executive Readout Report based on the findings and outcome of the workshops and interviews and which shall include the following:
  • The analysis of the Customer’s business and technical requirements and develop a baseline of current and planned video infrastructure and video system components, including documenting the Customer’s planned video system components.
  • Developed and documented ROI models based on data collected.
  • Documented use cases and evaluation of their priority of implementation in a Use Case Prioritization Matrix. Prioritization of use cases will be based on ease of capture and impact.
  • A mapping of Business Video capabilities required as demonstrated in the Use Cases.
  • A Business Video Capabilities Roadmap based on current capabilities and agreed prioritization of Use Cases and, which identifies the Customer’s current and future video capabilities based on Use Case requirements, gap analysis, and architectural assumptions.

• Present the Business Video Strategy Executive Readout Report to the Customer for approval.

  o Deliverable: Business Video Strategy Executive Readout Report

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:

• Provide upon Cisco’s request, Customer’s business plans describing goals, objectives, growth and metrics guidelines related to the project.
• Participate in interviews to validate, expand, and develop most relevant business use cases.
• Participate in discussions to identify, validate, and documenting Customer’s current video capabilities which include client architectural and network constraints.
• Provide information on business imperative priorities and challenges.
• Provide Customer designated technology and business stakeholders to determine evaluation criteria for prioritizing the implementation of use cases.
• Identify the Customer stakeholder responsible for the preparation of the business and financial plan.

3.5. **BV TelePresence Analysis and Reporting Service (COS OS BV-TARS)**

Cisco TelePresence Analysis and Reporting Service (“TARS”) provides Business Video Customers with access to the TARS portal to generate reports for managing their Business Video network rooms and endpoints. The Services include twelve (12) months of access to the TARS portal, portal activation, report setup, configuration changes, testing, and training.

**Cisco Responsibilities**

• Provide TARS Welcome Package to Customer defining the pre-requisites, activation activities and detailed information for accessing the TARS Support Center over the duration of Services.
• Schedule and conduct a kick off meeting with Customer designated representative(s) personnel to review the TARS Welcome Package and TARS Customer Questionnaire Form
• Review with the TARS Customer Questionnaire Form for completeness prior to Cisco performing the initial setup activities.
• Provide Customer with the TARS Welcome Package prior to the kick off meeting.
• Conduct a review of Customer’s current Business Video report output in order to understand specific requirements for Customer templates.
• Perform configuration activities to include: defining the TARS instance; service re-configuration; client re-configuration; re-installation; debugging of any of the service components; and integrating Customer’s data using the snapshot of existing data provide by the Customer.
• Work with Customer to test and customize (if necessary) the data extraction transformations based on the TARS Customer Questionnaire.
• Work with Customer to implement a reporting hierarchy (tree view of endpoints and infrastructure devices).
• Install and enable data extraction agent in test mode via VPN.
• Perform activities to manage the transition of portal into production mode.
• Conduct one (1) four hour knowledge transfer session with up to three (3) Customer designated personnel responsible for TARS.
• Conduct testing of TARS with the Customer by having Customer run reports and identify any outstanding issues needing resolution prior to TARS production mode acceptance.
• Review the annual support as defined in Customer TARS Welcome Package including: a) Instructions for Customer to contact the TARS Support Center not Cisco Technical Assistance Center (TAC) for TARS reporting support; b) TARS technical remediation and TARS reporting advice and TARS report guidance only; c) 24-hour 7-day a week access limited to duration of Service for Customer to open a Case with the TARS Support Center; d) TARS Support Center will make reasonable commercial efforts to respond to Customer within one (1) hour for all Cases received during Standard Business Hours. For cases received outside Standard Business Hours, Cisco will respond no later than the next business day. Standard Business Hours are 9:00 a.m. to 9:00 p.m., Eastern Standard Time, Monday through Friday, excluding Cisco-observed holidays.
• Supply the appropriate level of technical engineers support with knowledge of the TARS Software remotely for TARS problem resolution only.
• Provide full backup services nightly, and retain one (1) week of backup copies or duration of TARS Support Services.
  o **Deliverable:** Cisco TARS Welcome Package and TARS Customer Questionnaire

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer will provide the following:

• Designate at least two (2) but not more than three (3) technical representatives, to act as the primary technical interface to Cisco.

• Identify and schedule personnel to participate in meetings to validate and expand use case selection, including key personnel such as, executive sponsors and key stakeholders, video management, information technology (IT), telecom representatives, and any other stakeholders related to this project.

• Complete and return the TARS Customer Questionnaire to Cisco five (5) Business Days prior to the kick off meeting.

• Participate in discussions and provide Cisco with Business Video business plans describing goals, objectives, growth and metrics guidelines, which include client architectural and network constraints.

• Review with Cisco the existing Business Video report output and specific requirements for TARS Customer templates.

• Participate in configuration activities, including service re-configuration, client re-configuration, reinstallation, and debugging of any of the service components.

• Assist Cisco with loading TARS Data Extraction Agent on Customer’s TelePresence Management Server.

• Participate in TARS testing by running reports and identifying any outstanding issues needing resolution prior to system acceptance.

• Provide Cisco with remote access to the TARS agent(s) through a secure method such as VPN or collaboration session such that problems may be diagnosed and corrected remotely.

• Contact the Cisco TARS Support Center directly (not Cisco TAC) to open a trouble ticket and obtain operation support for limited to duration of Services at the following: cisco-support@designet.com or 978-443-5549 Option 1.

• Annual support renewal through Cisco will be required in order for Customer to continue to have TARS portal access after expiration of the initial twelve (12) months of support included in the scope of this SOW.

• Provide knowledgeable resources to help with questions and problem resolution.

### 3.6. **BV TelePresence Analysis and Reporting Consulting Service (COS OS BV-TARS-C)**

The Cisco Business Video TelePresence Analysis and Reporting (“TARS”) Consulting Service provides Customer with advice and guidance on the creation and configuration of additional TARS hierarchy report templates beyond the templates deployed. The consulting services also include additional analysis and reporting training for Customer support staff. Consulting Services will be provided remotely to Customer locations, unless otherwise agreed in writing by Cisco.

Note: Customer must have purchased TelePresence Analysis and Reporting Service (TARS) from Cisco Services before Cisco Services can perform any consulting work on TAR report templates or conducting any training.

**Cisco Responsibilities**

• Review with Customer the existing TARS report output and specific Customer templates.

• Schedule a conference call with Customer to determine the report template requirements.

• Create or modify additional TARS Hierarchy report template(s) (the TARS template) based on the Customer’s requirements and perform any configuration modifications if required.

• Evaluate new or modified TARS Hierarchy reports template(s) in test mode prior to placing into production.
  o **Deliverable:** Cisco TARS Hierarchy Report Template(s)

For Additional TARS Training add the following sections:

• Schedule a remote meeting to discuss Customer's training requirements.

• Schedule training date(s) to conduct remote training with Customer designated personnel.

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• Request access to VPN and systems needed to conduct training sessions.
• Conduct training session with Customer designated personnel responsible for TARS.
• Submit TARS Training Satisfaction Survey upon completion of the training session(s).
  o Deliverable: Cisco TARS Training Satisfaction Survey

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer will provide the following:
• Identify and schedule personnel to participate in meetings to discuss new TARS templates, including key personnel such as, executive sponsors and key stakeholders, video management, information technology (IT), telecom representatives, and any other stakeholders related to this project.
• Review with Cisco to understand the existing Cisco TARS report output and specific Customer templates.
• Provide upon Cisco’s request, Customer’s business plans describing goals, objectives, growth and metrics guidelines related to Business Video.
• Access the TARS Portal to review and test the newly created template(s) to ensure they meet the requirements as defined.
• Participate in TARS Hierarchy report testing by running reports and identifying any outstanding issues needing resolution prior to system acceptance.
• Provide confirmation that the TARS Hierarchy reporting functions per Customer design by accepting the relevant Milestone Completion Certificate provided by Cisco.
• Customer must have purchased TARS from Cisco before Cisco can perform any consulting work on TARS report templates or conduct any training.
• Consulting Services will be provided remotely to Customer locations, unless otherwise agreed in writing by Cisco.
• Additional TARS Reports do not extend the annual support service but become included into the current service support service.

For Additional TARS Training add the following sections:
• Participate with Cisco in a remote meeting to discuss Customer’s training requirements.
• Identify and schedule personnel to participate in the TARS Training
• Provide VPN and systems access if required by Cisco to conduct training sessions.
• Complete and return the TARS Training Satisfaction Survey upon completion of the training session(s).

3.7. Business Video Usage & Adoption Consulting (COS OS BV-UAC)

The Business Video Usage & Adoption Consulting Service provides Customer with an understanding of their current internal usage of Business Video collaboration service and tools, helps Customer identify the size and impact of the change and their organization’s readiness to adopt the changes needed to achieve the Customer’s specific business objectives related to their Cisco Business Video Collaboration Solution. Cisco provides expertise, guidance, best practices, tools, and techniques and collaborates with the Customer to apply them appropriately within the organization.

Cisco Responsibilities
• Schedule with the Customer the attendees to participate in the Technology Discovery workshop.
• Perform on-site Technology Discovery Workshop and Customer interviews.
• Present the Usage and Adoption Report to the Customer for approval
  o Deliverable: Business Video Usage & Adoption Consulting Report

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:
• Work with Cisco Services Architect to schedule on-site activities.
• Submit to the Cisco Services architects with necessary technical and business related information as needed.
• Schedule participants to attend the Technology Discovery Workshop conduct and interviews
3.8. **BV Consulting Support (COS OS BV-CONS)**

The Cisco Business Video Collaboration Architecture Subject Matter Expert Consulting Service provide general technical assistance to aid Customer. The typical skill set or capabilities and the type of Cisco personnel providing remote and/or on-site assistance to Customer include the following resources: Cisco Solution Architect.

### Cisco Responsibilities

- Cisco Solution Architect can assist the Customer in the following areas
  - Provide technical expertise to assist Customer with the planning and design of future deployments and integrations from an architectural perspective.
  - Provide technical expertise to assist Customer with questions and debugging of an existing deployment and integrations from an architectural perspective
  - Provide advisory support to Customer regarding planning and program enablement activities including use cases, training, user management, success criteria, etc.
  - Provide advisory support to Customer regarding overall deployment process from an architectural perspective (overall solution, technical architecture, integrations, user deployment, etc.)
  - Provide advisory support to Customer in regards to ongoing user rollouts, roadmap maintenance

### Customer Responsibilities

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Customer acknowledges that Cisco’s obligation is to only provide assistance to Customer with respect to the tasks as determined by Cisco and Customer and that such assistance may not result in some or all of the tasks being completed.
- Customer technical representatives will provide Cisco with such information, data and documentation as required for performing services. The following documents may be requested: Information relating to Customer’s network, design, business and other applicable requirements: functional and/or technical documentation relating to such requirements.
- Topology maps, configuration information and existing and proposed Video Collaboration architecture.
- Customer shall respond to Cisco’s requests within two (2) business days for documentation or information required for the project.
- Reasonable access to Customer site(s) and facilities including, where applicable, computer equipment, telecom equipment facilities and workspace.
- Customer shall provide proper security clearances and/or escorts as required to access equipment and/or lab facilities etc.

## 4. Customer Adoption Services

### 4.1. **Collaboration Adoption Assessment (COS AA CCM-A)**

Collaboration Adoption Assessment helps Customer identify the size and impact of the change and their organization’s readiness to adopt the changes needed to achieve the Customer’s specific business objectives related to their Cisco Collaboration Solution. Cisco provides expertise, guidance, best practices, tools, and techniques and collaborates with the Customer to apply them appropriately within the organization. The assessment may be conducted in a variety of ways, including surveys, workshops, interviews, and/or analysis of existing data.

### Cisco Responsibilities

- Work with the Customer to determine the appropriate assessment methods based on the identified objectives.
- Identify resources necessary to complete assessments.
- Establish the scope of assessment and identify key stakeholders.
- Work with the Customer to gather data and conduct surveys with key stakeholders.
- Work with Customer to develop the assessment documentation and success metrics required to perform and evaluate the assessments.
• Assist the Customer to plan and execute the assessments.
• Review the results of the data collected with the Customer and discuss the impact on design and implementation of the change program (Collaboration Adoption Strategy and Governance).

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:
• Collaborate with Cisco to evaluate and execute assessments.
• Make existing organizational communication channels available, as needed.
• Provide access to relevant operational and financial metrics.
• Facilitate communications with and access to stakeholders, especially executive sponsor.
• Work with Cisco to develop the documentation and success metrics required to perform and evaluate the assessments.
• Work with Cisco to perform the assessments.

4.2. **Collaboration Adoption Analytics Service (COS AA CCM-UAS)**

The Collaboration Adoption Analytics Service provides Customer with an understanding of their current internal usage of collaborative tools. The analytics services can include assessment of tool usage against benchmarks and best practices, as well as the completion of an Organizational Network Analysis (ONA). ONA is a method for Customer to view the communication and collaboration relationships within an organization. The Collaboration Adoption Analytics Service provides a spectrum of insights based on ongoing reviews of collaboration usage data. Collaboration Analyses may be conducted in a variety of ways, including surveys, workshops, interviews, and/or data analysis.

Cisco Responsibilities
• Work with Customer to gain access to the required Collaboration Tools in order to extract usage data.
• Work with the Customer to obtain attribute requirements for data correlation.
• Work with the Customer to conduct usage and/or organizational network analysis and interpretation for the specified Collaboration Tools and technologies.
• Document the results of the analyses and recommendations for the Customer.
• Work with the Customer to define data storage requirements.
• Provide data storage space for the specified term of the service.

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:
• Work with Cisco and provide access to data sources in order to extract needed collaboration usage data.
• Work with Cisco and provide access to data sources or an extract of attribute data to be used as identifiers for correlation and analysis.
• Ensure collection of collaboration data is in accordance with Customer's privacy policies and / or manage "opt-in" requests, notifications and agreements.

4.3. **Collaboration Adoption Strategy and Governance (COS AA CCM-SG)**

Collaboration Adoption Strategy and Governance service helps Customers plan, implement and reinforce change needed to increase adoption and target the Customer specific business goals of Cisco Collaboration Solutions. Cisco provides expertise, guidance, best practices, tools, and techniques and collaborates with the Customer to determine which are necessary and apply them appropriately within the organization. Cisco will work with the Customer to leverage the findings of the Collaboration Adoption Assessment (or equivalent) to create a Collaboration Adoption Strategy and Governance Plan.

Cisco Responsibilities
• Work with the Customer to develop a change management strategy providing a framework of guiding principles to promote change and adoption.

• Develop a change management deployment plan with the Customer including specific steps to achieve adoption and business goals.

• Assist the Customer to design and implement a change management governance plan ensuring policies, metrics, accountability, and reinforcements are sustained to promote ongoing adoption of Cisco Collaboration solutions.

• Provide consultative support while the Customer executes the change management governance plan.

Customer Responsibilities

In addition to the General Customer Responsibilities, Customer shall provide the following:

• Collaborate with Cisco to ensure the relevance and workability of all project activities.

• Lead the implementation of the change management plan with guidance from Cisco.

• Facilitate communications with and access to stakeholders, especially executive sponsor.

• Make existing organizational communication channels available, as needed.

4.4. Collaboration Adoption Marketing and Communication (COS AA CCM-MKTG)

Collaboration Adoption Marketing and Communications helps Customer develop and implement a comprehensive marketing and communications strategy designed to increase adoption and address the Customer’s specific business goals of Cisco Collaboration Solutions. Cisco provides expertise, guidance, best practices, tools, and techniques and collaborates with the Customer to determine which are necessary and apply them appropriately within the organization. Cisco works closely with the Customer to leverage the findings of the Collaboration Adoption Assessment (or equivalent) and create a Collaboration Adoption Marketing and Communications Plan.

Cisco Responsibilities

• Understand the existing communications infrastructure specific to new Collaboration tool introduction.

• Analyze the readiness of internal communications to support the change.

• Develop a communication plan with the Customer that includes key messages with a compelling case for the change, product information, target audience, communications channels, roles and responsibilities, success metrics and survey results.

• Interview key stakeholders and known early adopters.

• Create the Marketing and Communications Plan with the Customer including specific timelines, resources, deliverables, and milestones.

• Assist Customer to develop internal marketing communication content and collateral.

• Provide consultative support while the Customer executes the communication plan utilizing the marketing communication content developed with Cisco.

• Help identify ongoing Marketing and Communications activities to continually reinforce key messages, recognize success of the new product, and encourage ongoing adoption of the Cisco Collaboration solution.

Customer Responsibilities

In addition to the General Customer Responsibilities, Customer shall provide the following:

• Collaborate with Cisco to ensure the relevance and workability of all project activities.

• Implement the Marketing and Communications Plan with guidance from Cisco.

• Facilitate communications with and access to stakeholders, especially executive sponsor.

• Ensure availability of existing internal communication channels and infrastructure.

• Provide access to pertinent corporate branding material for inclusion in communications.
4.5. **Collaboration Adoption Training (COS AA CCM-T)**

Collaboration Adoption Training helps Customer plan, implement and reinforce comprehensive training to increase adoption and address the Customer’s specific business goals of Cisco Collaboration Solutions. Cisco provides expertise, guidance, best practices, tools, templates, techniques and collaborates with the Customer to determine which are necessary and apply them appropriately within the organization. Cisco will work closely with the Customer to leverage the findings of the Collaboration Adoption Assessment (or equivalent) to create a Collaboration Adoption Training Plan.

**Cisco Responsibilities**

- Analyze the readiness of the internal training resources to support the new training effort for the Cisco Collaboration solution.
- Develop a training strategy with the Customer providing the framework and guiding principles to promote change including key learning objectives, unique training needs for different stakeholder groups, roles and responsibilities of training resources, and success metrics.
- Create the training deployment plan with the Customer including specific timelines, resources, deliverables, and milestones.
- Assist Customer to develop any required training content, which may include the use of Cisco best practice tools, templates, designs and product-specific content.
- Provide consultative support while the Customer executes the training plan utilizing the training content developed with Cisco.
- Help identify ongoing training activities to support new behaviors and processes as well as promote ongoing adoption.

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Collaborate with Cisco to ensure the relevance and workability of all project activities.
- Lead the implementation of the Training Plan with guidance from Cisco.
- Facilitate communications with and access to stakeholders.
- Ensure availability of existing training resources and infrastructure.

4.6. **Collaboration Reference Center (COS KL CCM-CRC)**

The Collaboration Reference Center (CRC) provides enterprise-wide access to Cisco Collaboration content assets. The service delivers access valuable Cisco end-user product and engineering reference materials. The CRC interface will provide a Customer specific contextual-view of the potential content assets.

**Cisco Responsibilities**

- Schedule a remote kickoff meeting with the Customer to discuss Collaboration Reference Center Service.
- Assist Customer in access to the Collaboration Reference Center.
- Host content and provide preventative maintenance in accordance with Cisco’s normal maintenance schedules and procedures.
- Troubleshoot content or technical issues related to the portal (submit to crc-support@cisco.com).
- Updated content: Cisco may revise, update and/or remove previously-released content assets. Cisco will make any updated content available to Customer as a part of the Services. The updated content will exclude the previously-released assets that the updated content was intended to supersede.

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Complete a short on-boarding questionnaire which will include the following information: contact name, title, address, telephone number, e-mail address of primary and secondary team lead, email domain of the authorized viewers who will need access to the CRC.
- Work with the account team to provide CRC administrators with a complete list of all Cisco Collaboration products currently in use within the organization.
- Customer is responsible for security, network connection, IP address assignment and any required firewall or Access Control List changes required on Customer’s network in order for the end-users to access the CRC.
• Provide access to pertinent Customer corporate branding material including company logo for inclusion in the CRC
• Participate in feedback sessions with Cisco team to enable Cisco to understand the needs of the users of the CRC.
• Notify Cisco of any content or technical support requests issues related to the Services by sending an e-mail to Cisco team at refcenter-support@cisco.com.

5. Conferencing, Instant Messaging, & Social

5.1. **SC Community Creation Service (COS OS CIM-CCE)**

Cisco SC Community Creation Service provides analysis, design and implementation of a custom community template within Customer’s social collaboration environment. This service does not include any graphic design or custom application development activities.

**Cisco Responsibilities**

• Capture business and desired functional requirements by conducting up to three (3) Customer interviews per desired community
• Create social collaboration community template based on discovery and analysis
• Review with Customer the community design template
• Capture any Customer changes, new requirements and modify as necessary the template as required.
• Assist Customer in deploying the final community template within their existing social collaboration environment.

  o **Deliverable: Cisco Social Collaboration Custom Community Template**

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

• Identify relevant key stakeholder to attend the Social Collaboration workshop and interviews and other related meetings.
• Provide necessary details on social collaboration community requirements.
• Identify reviewers of necessary deliverables to provide comment and approval.

5.2. **SC Support (COS OM CIM-SCS)**

Cisco SC Support Service is a remote offering to help a Customer with post-deployment support activities in areas such as issue troubleshooting and ongoing deployment support. Cisco Services Engineer will review the documented open events and cases with the Cisco TAC organization, track to resolution, while keeping Customer apprised of the progress and document findings including root cause analysis and recommendations. Cisco Services Engineer will review with the Customer the proper procedure to open a trouble ticket through Cisco TAC.

**Cisco Responsibilities**

• Provide consultative support to resolve daily operations issues and troubleshooting assistance during Standard Business Hours of business.
• Review the Cisco TAC escalation procedure with the Customer.
• Provide TAC escalation assistance after the Customer follows the proper Cisco TAC procedures and proper escalation process.
• Cisco Services Engineer will review the open TAC cases and tracking progress.
• Collaborate with Cisco TAC regarding the Customer’s social collaboration environment to assist Cisco TAC and any third-party vendors in resolving the incident.
• The Cisco Services Engineer will provide remote support to Customer in dealing with open P1 and P2 cases. The Cisco Services Engineer will monitor, assist and escalate when necessary to help resolve these issues. Cisco TAC is responsible for the case.

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:

• Submit a list of names of skilled and trained resources for the social collaboration post-deployment support to operate the social collaboration platform.

• Prior to opening a ticket with Cisco Technical Assistance Center and Cisco Services Engineer, Customer must perform diagnostics on the social collaboration platform.

• Customer must attempt to determine if any issue is related to the scope of the project prior to contacting the Cisco TAC and Cisco Service Engineer.

• Customer understands that the Cisco Social Collaboration Support Service will be performed remotely and Cisco Service Engineer will work cases during Standard Business Hours.

• Customer is the governing authority of the Cisco Social Collaboration Support Services provided by Cisco and retains full responsibility for the leadership, review, and approval of actions taken.

• Customer understands and acknowledges that the following are not provided or a part of the Cisco Social Collaboration Support Service:
  • Cisco Services Engineer does not make any changes to the Customer production environment.
  • P3/P4 TAC cases.
  • Onsite presence for TAC case support
  • Cisco Social Collaboration Support Service does not replace Cisco TAC Support services.

5.3. **CIMS Collaboration Performance Review and Recommendation (COS AA CIM-PRR)**

The Collaboration Performance Review and Recommendation service establishes the current performance pattern of deployed collaboration technology by client specified areas of interest (Network Performance, Meeting Center, Training Center, Jabber, etc.), identifies where gaps exist between objectives and realization, and provides recommendations to improve performance of the technology.

Cisco will use a combination of Cisco Collaboration performance metrics combined with client-provided information to create a base performance profile based on client criteria. Cisco will then conduct discovery, interview and workshop sessions with Customer's users, technical support staff, and service providers to identify and document impediments to optimal performance. These impediments may include HW, SW, Network, and educational barriers to realizing the desired performance. Cisco will present its findings, recommended client actions, additional services to close identified impediments, and plans for remediation in the Performance Review and Recommendation Report. There will be a 90, 180, 270, and 360-day reviews and updates of the findings in this report.

The Collaboration Performance Review and Recommendation service is available for the one or more of the following technologies as stated in the Customer's quote:

• WebEx Centers • Jabber

Cisco Responsibilities

• Contact Customer to identify client specified criteria for Base Performance Measurement Profile and assure access to appropriate Cisco internal system records to construct profile

• Coordinate with Customer to identify and schedule with Customer personnel required to participate remotely in discovery.

• Develop schedule for performing data collection, interviews, and analysis.

• Confirm and develop base performance profile.

• Perform needed technical research, interviews, and data gathering and analysis for developing performance remediation recommendations.
• Present and review the findings with the Customer.
  
  o Deliverables: Collaboration Performance Review and Recommendation Report

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:

• Schedule attendees for the pre-kick off meeting, Interview Sessions and Workshop.
• Provide Cisco with data required for the creation of the reports and recommendations.
• Schedule meetings and discovery sessions as required for the execution of the service.
• Provide documentation and other information collection as requested by Cisco.
• Ensure appropriate personnel are available and participate in 90, 180, 270, and 360-day Performance Measurement Report reviews.
• Review the recommendations as stated in the Performance Review and Recommendation Report.

5.4. **CIM Subject Matter Expert (COS OS CIM-SME)**

The Cisco Conferencing and Instant Messaging Subject Matter Expert Service provide general technical assistance to aid Customer. The typical skill set or capabilities and the type of Cisco personnel providing remote and/or on-site assistance to Customer include one or more of the following resources: Cisco Project Manager, Engineer and/or Solution Architect.

**Cisco Responsibilities**

• Cisco Project Manager can assist the Customer in the following areas:
  
  • Subject matter expertise around Cisco Conferencing and Instant Messaging project plan development to assist Customer with identifying the necessary steps, dependencies, and timeframes
  
  • Advisory support to Customer regarding overall deployment process from a PM perspective

• Cisco Engineer can assist the Customer in the following areas:
  
  • Technical expertise to assist Customer with the planning and design of future deployments and integrations from an engineering perspective.
  
  • Technical expertise to assist Customer with questions / debugging of an existing deployment and integrations from an engineering perspective.
  
  • Advisory support to Customer regarding overall deployment process from a technical perspective (Hardware, Software and network).
  
  • Advisory support to Customer regarding operations from an engineering perspective (pro-active monitoring, backups, etc.).
  
  • Assist in escalation of product issues. Customers are responsible for opening all Cisco TAC cases.

• Cisco Solution Architect can assist the Customer in the following areas

  • Provide technical expertise to assist Customer with the planning and design of future deployments and integrations from an architectural perspective.
  
  • Provide technical expertise to assist Customer with questions and debugging of an existing deployment and integrations from an architectural perspective
  
  • Provide advisory support to Customer regarding planning and program enablement activities including use cases, training, user management, success criteria, etc.
  
  • Provide advisory support to Customer regarding overall deployment process from an architectural perspective (overall solution, technical architecture, integrations, user deployment, etc.).
  
  • Assist in escalation of product issues. Customers are responsible for opening all Cisco TAC cases.
  
  • Provide advisory support to Customer in regards to ongoing user rollouts, roadmap maintenance

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:
• Customer acknowledges that Cisco’s obligation is to only provide assistance to Customer with respect to the tasks as determined by Cisco and Customer and that such assistance may not result in some or all of the tasks being completed.

• Customer technical representatives will provide Cisco with such information, data and documentation as required for performing services. The following documents may be requested: Information relating to Customer’s network, design, business and other applicable requirements: functional and/or technical documentation relating to such requirements.

• Topology maps, configuration information and existing and proposed Cisco Conferencing and Instant Messaging infrastructure. Customer shall respond to Cisco’s requests within two (2) business days for documentation or information required for the project.

• Reasonable access to Customer site(s) and facilities including, where applicable, computer equipment, telecom equipment, facilities and workspace. Customer shall provide proper security clearances and/or escorts as required to access equipment and/or lab facilities etc.

• Customer shall ensure that contracts with its own vendors, end users and third-party are fully executed and reflect the correct terms. Customer is responsible for the management, support and direction of the resource supplied to Customer by Cisco.

6. Customer Collaboration Services

6.1. **UCC Software Recommendation Review (COS AA UCC-PSR)**

The Customer Collaboration Software Recommendation Review Service engages Cisco engineers to review the Customer’s current Customer Collaboration Software Release levels and the potential impact when planning changes to the Unified Contact Center (UCCE) environment. This service includes a Software audit that recommends Software updates and/or patches based on bug scrubs, open TAC cases, field notices and security advisories. The Customer Collaboration Software Recommendation Review service will examine new Software releases and evaluate interdependencies between contact center components, and identify potential risks and challenges involved in recommended Customer Collaboration Software changes. This service will provide the Customer the ongoing review of major Unified Contact Center issues such as end of life and end of sale Software Releases. Cisco will review Customer’s Customer Collaboration Software release update implementation plan and contingency planning to provide recommendations based on leading practices. This service will perform analysis on the impact of these notifications on the Customer's Unified Contact Center environment.

**Cisco Responsibilities**

• Schedule remote kick off meeting with the Customer to discuss the Software Recommendation Review process.

• Obtain from Customer the following information:
  • Current Software Release and Hardware version for Unified Contact Center solution components (for example, UCCE, UICM, UCVP).
  • High-level design document or architectural drawing that identifies location of contact center components.
  • Configuration description for each of the key components.
  • Detailed requirements of the Customer’s Contact Center Solution that include but are not limited to scalability, security and manageability.
  • Solution roadmap that may include but is not limited to new service details and network location changes.
  • Information on Customer business and technical requirements for new Contact Center Software releases.
  • Customer certification process and/or lab testing process.
  • Customer change control process.

• Conduct Customer Collaboration Software Release Discovery Session.

• Identify and recommend applicable Cisco Customer Collaboration Software Releases that address Customer’s current feature and functional requirements.

• For any outstanding issues remotely review point releases or patches to address:
  • Bug scrub, review Customer’s open (Customer Collaboration) TAC cases related to the outstanding issue(s), field notices, and/or security advisories.
• Evaluate and report on risks and challenges involved in recommended Software changes and interdependencies between contact center components and configuration.
• Review Customer's contingency plan for transitioning the Customer’s current Software to new Customer Collaboration Software updates.
• Provide Software Release Report summaries to Customer via email distribution on the following:
  • Recent Software releases related to the Customer’s Customer Collaboration solution and provide update software recommendations.
  • Major Customer Collaboration announcements such as end of life and end of sale Software releases.
  • Provide guidance and recommendation about field notices and security advisories related to Customer environment as required.
  • End of sale/end of life and Software release announcements reviewed on a regular basis.
• Conduct the Software Recommendation Release Workshop to review assessment findings and present recommendations.
• Present findings and recommendations in the Software Recommendation Release Report to Customer for approval.
  • Deliverable: Software Recommendation Release Report

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:
• Current Software Release and Hardware versions for Unified Contact Center solution components (for example, UCCE, UICM, UCVP).
• High-level architectural drawing that shows where components are located (for example, geographical location or location within the Network).
• High-level design document or architectural drawing that identifies location of contact center components.
• Notify Cisco of any new service and Unified Contact Center network changes.
• Schedule participants for the remote Customer Collaboration Software Release Discovery Session.
• Customer understands the following areas are not covered within Software Recommendation service:
  • Unified Communication Hardware and network architecture.
  • Operating System support.
  • Operating System compatibility beyond solution as documented in Cisco's hardware and system software specification (Bill of Materials) for Cisco Unified ICM/IPCC Enterprise and Hosted Editions.
• Schedule the Software Recommendation Release Workshop (remote/up to 4 hours) to review audit findings and present Software Recommendation Report.

6.2. UCC Ongoing Architecture Design Review (COS AA UCC-ADR)

The Customer Collaboration Architecture Ongoing Design Review Service assesses the scalability of Unified Contact Center system and infrastructure design requirements to address Customer’s current and future business initiatives. The Ongoing Architecture Design Review Discovery discovery session focuses on discussion of aligning business requirements to current and future planning activities—introducing new technologies, efficiency and expansion changes and other related topics. The Ongoing Architecture Design Review workshop reviews the Customer’s architecture design by identifying potential gaps, improvements and provides recommendations based on Cisco leading practices. An additional important aspect of architecture design is system capacity and monitoring of specific UCC component utilization metrics. A system capacity assessment baseline will be established to analyze the impact of growth to the current Unified Contact Center system configuration, capacity performance and licensing on the Customer’s Unified Contact Center system. Customer Collaboration Capacity Planning identifies the impact call volumes have on the system capacity and recommends remediation to bring capacities into compliance with Cisco guidelines. These outcomes and findings are then documented and presented to the Customer in the Ongoing Architecture Design Review Report. The Architecture Design roadmap outlines a high level design roadmap that provides a blueprint to support the ongoing alignment of business, technology, and capacity utilization in the Customer’s current and future planning activities.

Cisco Responsibilities
• Conduct kick off meeting with Customer to review the information required to perform the Architecture Design Review and Capacity Assessment analysis.

• Request the following documents from the Customer:
  • Current architectural design,
  • Network topology
  • Contact center as built documents, and any additional documentation and materials requested by Cisco

• Conduct Unified Contact Center Ongoing Architecture Design Discovery session (remote/up to 8 hours) to address:
  • Review of Customer’s design requirements.
  • Discuss future planned changes to the current Unified Contact Center infrastructure.
  • Discuss the impact future requirements on existing contact center.

• Analyze gathered documentation and the information collected during the Architecture Design discovery session.

• Conduct Unified Contact Center Ongoing Architecture Design Review workshop (remote/up to 4 hours) to review findings.

• Enable Unified Contact Center component specific performance counters.

• Schedule and perform a Unified Contact Center performance counter data collection.

• Request documents related to Customer’s current and future expansion plans.

• Obtain from Customer documents related to Unified Contact Center licenses purchased for each Unified Contact Center products.

• Compare Unified Contact Center configuration and utilization to Customer licensing.

• Schedule and conduct a Customer Collaboration Capacity Planning Discovery Session.
  • Discuss business goals and objectives related to Unified Contact Center systems.
  • Discuss the impact of changes in growth/downsizing on capacity requirements.
  • Discuss any planned changes in current business model.
  • Discuss with the Customer any issues related to capacity.

• Determine capacity requirements of all Unified Contact Center components.
  • Current system sizing.
  • Future growth as defined during the Customer Collaboration Capacity discovery session

• Analyze and document data gathered.

• Conduct Capacity Planning Workshop and present Capacity Planning Report findings and recommendations to the Customer.
  • Deliverable: Ongoing Architecture Design Review Report

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:

• Low level design document describing how the Customer’s Contact Center system and solutions were built and engineered to meet a specific set of technical requirements and design goals.

• Ensure key detailed design stakeholders and decision-makers are available to participate during the course of the service.

• Extract network topology (contact center and telephony components and network infrastructure).

• Extract information defined by Cisco required in conducting the architecture analysis

• Schedule the Architecture Discovery Session and Architecture Design Workshop with the appropriate personnel.

• Documentation defining Customer’s business goals, objectives, key performance indicators, technical requirements related to architecture design planning.

• Understand that the Architecture Review will be performed remotely.

• Understands and acknowledges that the following are not covered or a part of the Architecture Review service:
• Network and Unified Communication Hardware, Software and network architectures.
• Call Routing/Admin Script review.
• Customization and development of Agent Desktop.
• UCCE call flow configuration (software application).

• Submit capacity and license related information to Cisco.
• Documents related to growth, changes and business planning to Cisco.
• Documents related to capacity and traffic requirements to Cisco.
• Access to business and technical resources.
• Provide remote access to all Unified Contact Center servers.
• Customer understands that the Capacity performance counter data collection will be performed remotely.
• Customer understands and acknowledges that the following are not provided or a part of the Capacity Planning service:
  • Unified Communication capacity planning (UCM, Gateways, etc.). Performance monitoring of Cisco Unified CallManager and related products.
  • Third party application integration

6.3. **UCC Finesse Desktop Discovery (COS AA UCC-FDD)**

The UCC Finesse Desktop Discovery offering helps Customers define their strategy, business goals and objectives for contact center Finesse integrations. The Finesse Discovery service provides high level education around Unified Contact Center Finesse product in general and then goes into an assessment of the Customers current contact center in order to develop recommendations to support the current and future contact center Finesse strategies. This service brings together contact center business and IT management personnel to identify Customer’s key Finesse requirements around softphone, screen pop, etc. The discovery requirements, findings and recommendations are then provided in the Finesse Desktop Discovery Assessment report.

**Cisco Responsibilities**

• Schedule and hold Customer kick off meeting.
• Provide Finesse Desktop Discovery Checklist to Customer prior to workshop.
• Perform Discovery Workshop with Customer designated employees.
• Create Finesse Desktop Discovery Assessment report based on information provided by Customer and notes from discovery workshop meetings.
• Review Finesse Desktop Discovery Assessment report with Customer.
  
  ○ **Deliverable: Finesse Desktop Discovery Assessment**

**Customer Responsibilities**

• Designate a single point of contact for all Cisco communication. This person has the authority to act on all aspects of the work being performed.
• Designate a backup contact when Customer contact is unavailable. This person has the authority to act on all aspects of the work being performed in absence of the primary contact.
• Attend the kick off meeting.
• Designate appropriate Customer resources to attend Finesse Desktop Discovery Workshop meetings.
• Provide room with whiteboard and projector for Discovery Workshop meetings.
• Attend and provide feedback during Finesse Desktop Discovery Assessment review.

6.4. **UCC Software Risk Analysis (COS AA UCC-SRA)**
The Customer Collaboration Software Risk Analysis service includes a proactive analysis of Customer Collaboration Software defects, security advisories (PSIRTs), Maintenance Releases, and engineering specials (ESs) that Cisco generates when issues are uncovered that may impact the Cisco Unified Contact Center product suite. The notifications include recommended action to repair and/or protect the affected components from these issues. Cisco will provide an analysis of known defects and their resolution with regard to its possible impact on the Customer’s Unified Contact Center solutions. If a solution is provided with the notification, it will be analyzed relative to the Customer’s Contact Center environment.

Cisco Responsibilities

- Review Cisco Customer Collaboration Software announcements and alerts to understand relevance to Customer’s systems.
- Performing analysis of how known defects may impact the Customer’s Unified Contact Center solution.
- Depending on the proposed resolution, Cisco Services Engineer may:
  - Help the Customer with recommendations to review the appropriate testing approach.
  - Review similar environments and correlate features and code.
- As required based on announcements and alerts, create a Customer Collaboration Software Risk Analysis Update to submit to Customer for review.
- Present findings and recommendations in the Customer Collaboration Software Risk Analysis Updates to the Customer for approval
  - Deliverable: Software Risk Analysis Updates

Customer Responsibilities

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Details of current Customer Collaboration Software release and Hardware version for Unified Contact Center solution components (for example, Unified Contact Center Enterprise (UCCE) system and peripheral gateways).
- High-level architectural drawing that shows where components are located (for example, geographical location or location within the Network).
- Current and new feature/functionality and capability requirements including the initial UCCE design requirements documents.
- Resources as required by Cisco to obtain information or support.
- Reviews proposed solution or workaround for the Customer’s issues and approve Customer support organization to implement change.
  - Onsite/remote access to network devices related to the issue.
  - Provides the Cisco engineer with any relevant information.
  - Service will be delivered remotely.
- Customer understands and acknowledges that the following are not provided or a part of the Customer Collaboration Software Recommendation service:
  - Unified Communication Hardware and network architecture.
  - Operating System support.
  - Operating System compatibility beyond solution as documented in Cisco’s hardware and system software specification (bill of materials) for Cisco Unified ICM/UCC Enterprise.
  - Strategic planning for major Customer Collaboration Software Releases and upgrades.
- Review and approved the Customer Collaboration Software Release Analysis Updates.

6.5. **UCC System Audit (COS AA UCC-SYA)**

The Customer Collaboration System Audit Service examines the Customer’s current Unified Contact Center system and examines the Unified Contact Center application configuration and design, including agent, agent desk setting, skill groups and translation routes. This service audits the Customer’s existing contact center infrastructure to establish a framework to help with planning current and future changes to the Unified Contact Center environment. The Customer Collaboration System Audit Discovery session focuses on system and application effectiveness based on business imperatives/requirements, potential contact center changes and the impact of...
these changes to the current Unified Contact Center environment. The Customer Collaboration System Audit Workshop reviews the findings of the system and application audit, identifies gaps, and provides recommendation of changes to optimize the Customer’s current Unified Contact Center solution.

**Cisco Responsibilities**

- Request system and application configuration related documentation from the Customer.
- Schedule and conduct a System Audit Discovery Session (remote/up to 4 hours). This session will cover the following:
  - Understand Customer’s business goals may impact changing the current system.
  - Current challenges.
  - Application changes (planned and already done).
  - Potential impact to current architecture/capacities.
  - Risk identification.
  - Availability/Stability issues (which may be related to application configuration).
  - Review with Customer sites included in the system audit.
- Discuss the server, domain and Cisco Support Tools loading requirements on the Customer provided server. If Customer has a Cisco Support Tool Server in place, no additional server will be required.
- Provide guidelines for system settings required for successfully running audit tools.
- Schedule with the Customer deploying Data Collection Tools for conducting the audit(s).
- Obtain remote access to all Unified Contact Center servers.
- Document discovery session findings and conduct audit.
  - Current Unified Contact Center Enterprise system Hardware and Software components including Unified Customer Voice Portal (UCVP, IP IVR, Gatekeeper, and related Unified Communication Manager components
  - Agents, Desk Settings, Skill Groups, and translation route configuration
- Run performance monitoring tools on all Unified Contact Center servers.
- Gather data and document findings into Customer Collaboration System Audit Report.
- Conduct Customer Collaboration System Audit Review workshop (remote/up to 4 hours) to review findings.
- Present findings and recommendations in the Customer Collaboration system audit findings, identify gaps and limitations, and provide recommendations in the Customer Collaboration System Audit Report.
- **Deliverable:** Customer Collaboration System Audit Report

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Schedule resources to attend an System Audit Discovery session (remote/up to 4 hours) to discuss the following areas:
  - Identify business goals and requirements.
  - Current challenges.
  - Application changes (planned and already completed).
  - Potential impact to current architecture/capacities.
  - Risk identification.
  - Availability/Stability issues (which may be related to application configuration).
- Ensure key contact center design stakeholders and decision-makers are available to participate during the course of the service.
- Deploy Data Collection Tools for conducting the audit.
- Provide or extract additional information required to conduct analysis.
- Identify and provide documentation regarding site location, address and site contact information to Cisco.
• Prepare servers as required to allow for the successful running of data gathering tools.
• Provide Cisco the following:
  • Schedule with the Customer setup, testing and deploying of Data Collection Tools for conducting the audit(s).
  • Provide remote access to all Unified Contact Center servers.
  • Current Unified Contact Center Hardware and Software information included in the audit-- Unified Customer Voice Portal (UCVP), voice gateways, VXML gateways, IP IVR, Gatekeeper, etc.
  • Agents, Desk Settings, Skill Groups, and translation route etc.
  • Business and technical resources responsible for providing information to Cisco.
  • Any documentation related to future contact center planning.
  • Administrators and developers of the Unified Contact Center applications related to agent, agent desk setting, skill groups, remote agents, and translation routes.
• Schedule resources to attend the Customer Collaboration System Audit Workshop to review findings.
• Customer understands that the Customer Collaboration System Audit will be performed remotely.
• Customer is aware that a server is defined as any system (virtual or physical) that runs a separate operating system.
• Customer understands that a Cisco Network and Unified Communication audit must have been performed within the last twelve months otherwise these audits must be performed to ensure Unified Contact Center supportability.
• Customer understands that any upgrades performed since the audit of the network and Unified Communication infrastructure will require new network or UC audits performed.
• Customer understands and acknowledges that the following are not covered or a part of the Customer Collaboration System Audit service: Unified Communication capacity planning (UCM, Gateways, etc.), performance monitoring of Cisco Unified Call Manager and related products, 3rd party application integration, Unified Communications components (CUCM, Gateways, Unity, TelePresence, etc.) not related to contact center, LAN/WAN infrastructure, call routing logic, script review, knowledge transfer, report validation, and 3rd party integration and products
• Review and approve the Customer Collaboration System Audit.

6.6. **UCC Precision Routing Design Review (COS AA UCC-PRDR)**

The UCC Precision Routing Design Review is intended to provide design recommendations and a strategy for the implementation of Cisco UCCE’s Precision Routing capabilities. This service will identify and document suggested application design considerations for the successful pilot of Precision Routing for a limited pilot which can be utilized as design templates for expanded rollout of the feature throughout Customer’s individual Contact Center Lines of Business. The UCC Precision Routing Design Review workshop provides a technical working session to discuss ways to approach Precision Routing script development and create examples of implementing the recommended design.

**Cisco Responsibilities**
• Schedule remote kick off meeting with Customer to discuss:
  • Specific business goals/requirements that drive the Customer’s decision to move to Precision Routing,
  • Business process changes necessary to implement Precision Routing,
  • Future plans for expanded Precision Routing implementations to assess needs versus capacity limitations,
  • What features of Precision Routing will be used and how they will help Customer meet business goals,
  • Site Specific Routing vs. Enterprise Routing – which Lines of Business span multiple sites and require complex skill configuration and routing,
  • How reporting requirements will change, and
  • Documentation the Customer can provide that details current business rules and proposed post-Precision Routing call routing.
• Obtain from Customer the following:
  • Call flow diagrams to assess where Precision Routing fits and where it doesn’t,
  • Skill group configuration to determine who will benefit from Precision Routing, and
  • Additional documentation agreed upon during kick off meeting that details current business rules and proposed post-Precision Routing call routing.

• Analyze and document findings in the Precision Routing Design Review Report.
• Schedule Precision Routing Design Review Workshop to discuss findings and recommendations
• Conduct Precision Routing Design Review Workshop.
  • Present Precision Routing design strategies across lines of businesses, multiple sites, and enterprise,
  • Present how queue treatment varies from one line of business to another, and
  • Collaborate and plan implementation strategy.
  • Present Precision Routing Design Review Report to Customer.

  o Deliverable: UCC Precision Routing Design Review Report

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:

• Schedule participants to attend the remote kick off meeting with Cisco and Customer personnel.
• Call flow diagrams to assess where Precision Routing fits and where it doesn’t.
• Skill group configuration to determine who will benefit from Precision Routing.
• Additional documentation agreed upon during kick off meeting that details current business rules and proposed post-Precision Routing call routing.
• Schedule participants to attend the remote Precision Routing Design Review Workshop.
• Review findings and recommendations of the Precision Routing Design Review Report.
• Customer understands that the Precision Routing Design Review will be performed remotely.
• Customer understands and acknowledges that the following are not covered or a part of the Precision Routing Design Review service:
  • Script reviews and recommendations beyond the amount contracted.
  • Call Manager configuration.
  • TDM ACD configuration.
  • 3rd party applications, integrations, script objects (custom java, etc.).
  • Voice recognition and text to speech scripts (except built in).
  • Custom developed objects or code (Example: Custom Java code within UCVP Studio script).
  • Reconciling of report data.
  • Troubleshooting and escalation for TAC issues related to scripting
  • Submit capacity and license related information to Cisco.

6.7. UCC Ongoing Scripting Design Review (COS OS UCC-SDR)

The Customer Collaboration Scripting Design Review examines a subset of representative Unified Contact Center scripts (maximum of 12) mutually agreed with the Customer for script design review. This service will identify and document inefficiencies in design, script flows outside of leading practices, and assist in script consistency and repeatable standards. The Customer Collaboration Script Design Workshop provides a technical working session to discuss ways to approach script development and create examples of implementing script review recommendations.
Cisco Responsibilities

• Discuss with the Customer the scripts to be reviewed.

• Script review, consisting of:
  • Review the pre-determined scripts identified by the Customers.
  • Perform a script review of Customer identified scripts and provide recommendations.
  • Identify methodologies that conflict with leading practices and outline recommendations.
  • Identify where scripts may be changed to improve efficiency in script administration.
  • Review Customer scripts for consistency and alignment to repeatable standards.

• Analyze and document findings in the Script Design Review Report.

• Schedule Script Design Review workshop to discuss findings and recommendations (remote/up to 8 hours).

• Present Script Design Review Report to the Customer.

• Conduct Script Design Review Workshop.
  • Present standardized script design strategies across applications and across enterprise.
  • Collaborate and plan implementation strategy for recommended script modifications.
  • Discussion may include:
    • Based on review findings.
    • Work to create example scripts.
    • Discuss script requirements related to specific reporting goals.
    • Whiteboard example scripts.
  
  o **Deliverable:** Scripting Review Report

Customer Responsibilities

**In addition to the General Customer Responsibilities, Customer shall provide the following:**

• Schedule scripting resources to attend the Script Design Review conference call.

• Identify to Cisco the scripts to be reviewed.

• Provide to Cisco the identified Unified Contact Center script documentation developed by both internal resources and third party vendors.

• Provide access to script library.

• Provide access to Customer/developer resource(s) to review the custom and third party script components that interact with standard scripting.

• Review and approve findings and recommendations of the Script Design Review Report.

• Schedule scripting resources to attend Script Design Review Workshop.

• Customer understands that the Script Design Review will be performed remotely.

• Customer must select the specific scripts to be reviewed.

• Customer must have access to call routing script library and documentation.

• Customer understands and acknowledges that the following are not covered or a part of the Script Design Review service:
  • Script reviews and recommendations beyond the amount contracted.
  • Call Manager configuration.
  • TDM ACD configuration.
  • Third-party applications, integrations, script objects (custom java, etc.).
  • Voice recognition and text to speech scripts (except built in).

  • Custom developed objects or code (Example: Custom Java code within UCVP Studio script).
• Reconciling of report data.
• Troubleshooting and escalation for TAC issues related to scripting

6.8. **UCC Reports Discovery (COS OS UCC-RPTD)**

The Customer Collaboration Reports Discovery provides Unified Contact Center Enterprise Customers with the planning and design, of Customer-definable reports. This includes a Reports Discovery session for gathering custom report requirements that meet the Customer’s business needs. Customers will work with an experienced Cisco Services Engineer, skilled in contact center reporting metrics, database schemas, reporting platforms like Cisco Unified Intelligence Center (CUIC), SQL (Structured Query Language) and Cisco’s development best practices.

**Cisco Responsibilities**
- Verify with the Customer the reporting solution and related hardware platform has been implemented and functioning.
- Conduct Reporting Discovery Session with Customer personnel responsible for developing Unified Contact Center Reports.
- Develop Custom Report Requirements document.

  o **Deliverable: Custom Report Requirements**

**Customer Responsibilities**
In addition to the General Customer Responsibilities, Customer shall provide the following:
- Remote access to reporting platforms, Software implementation, historical database server and contact center reporting platform.
- Cisco access to resources responsible for the management and support of contact center reports.
- Documented requirements of layout and data required.
- Understands and acknowledges that Cisco will not develop custom reports or perform troubleshooting on any existing reports.
- Review and approve the Custom Report Requirements deliverable.

6.9. **UCC Business Consulting (COS OS UCC-CONS)**

The Customer Collaboration Business Consulting service provides a portfolio of service offerings designed to assist Customer in aligning IT requirements with business priorities and imperatives. Using these service offerings, Customer will drive more business value from the contact center technology. This service provides Customer with market differentiation, business agility, and provides a faster speed to market with improved business metrics and reporting.

The entire consulting engagement may include multiple services delivered either as a standalone module, or multiple services delivered in tandem. See below for some of these high-level activities and deliverables. After complete scoping of the engagement Cisco provides a detailed engagement timeline, agenda and scope.

May include one or more of the following options:

**Transformation and Strategy**
Formulate a Customer Collaboration Strategy in alignment with Customer’s business priorities and execution strategies.

**Cisco Responsibilities**
- Prepare exercise for the engagement.
- Perform on-site discovery with key stakeholders through one or more of the following: interviews, workshops, and data collection.
- Provide a current state analysis and key findings around areas of improvement.
- Provide recommendations on business metrics based on the current state and a strategy on how to move from the current to future state with business value use case examples.
- Perform data analysis and provide business metric insights.
• Provide documentation of results and findings.
• Present executive readout of recommendations to the Customer for approval.
• Perform remote quarterly reviews.
  
  o **Deliverable: Business Insight Metrics Report for Customer Collaboration**

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

• Work with Cisco Advanced Services architect to schedule on-site activities.
• Appropriate physical and remote access sufficient for Cisco to perform business insight metrics analysis.
• Provide Cisco Advanced Services architects with necessary Customer Collaboration technical and business metrics related information required for business insight metrics data analysis.
• Review analysis of current state and business priorities for accuracy.
• Review business insight metrics recommendations.
• Review documentation and reports provided.
• Present the Business Insight Metrics Report for Customer Collaboration executive readout to key stakeholders for review and approval.
• Attend quarterly reviews with Cisco.

**Business Requirements and Architecture**

Work from findings provided from Transformation and Strategy deliverables to provide further in-depth Business Requirements

**Cisco Responsibilities**

• Validate and prioritize the business architecture (opportunity Areas) proposed earlier in the CC Strategy paper.
• Collaborate with key stakeholders from business units and work through the details of the business implementation of all the opportunity areas from a process and people standpoint.
• Prepare exercise for the engagement.
• Perform on-site work with key stakeholders through interviews, workshops, and draft requirements.
• Review Customer Collaboration Business Requirements and Architecture Report results and findings for approval.
  
  o **Deliverable: Customer Collaboration Business Requirements and Architecture Report (One (1) Business Unit)**

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

• Work with Cisco Services Architect to schedule on-site activities.
• Submit to the Cisco Services architects with necessary technical and business related information as needed.
• Gather data and conduct interviews from the One (1) pre-defined Business Unit
• Create the Customer Collaboration Business Requirements and Architecture Report (One (1) Business Unit) detailing findings and recommendations
• Review and approve the Customer Collaboration Business Requirements and Architecture Report and validate and prioritize future state business architecture.

**Technology and Architecture Strategy**

Work from findings provided from Business Requirements and Architecture deliverable to provide additional business architecture strategy.

**Cisco Responsibilities**

• Schedule with the Customer the attendees to participate in the Technology Discovery workshop.
• Perform on-site Technology Discovery Workshop and Customer interviews.
• Create the Technology and Architecture Strategy Report documenting findings and recommendations.
• Present the Technology and Architecture Strategy Report to the Customer for approval
  o **Deliverable: Technology and Architecture Strategy Report**

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

• Work with Cisco Services Architect to schedule on-site activities.
• Submit to the Cisco Services architects with necessary technical and business related information as needed.
• Schedule participants to attend the Technology Discovery Workshop conduct and interviews
• Create the Technology and Architecture Strategy Report detailing findings and recommendations
• Review and approve the Technology and Architecture Strategy Report and validate and prioritize future state business architecture.

**Business Case Justification**

Provide assistance in helping Customer to justify a business case by establishing key value levers that drive maximum business value for the Customer.

**Cisco Responsibilities**

• Perform a quantitative analysis study of these value levers based on the chosen business and financial metrics.
• Schedule with Customer the Business Case Justification workshop and interviews.
• Conduct the Business Justification workshop and interviews to collect business and financial information.
• Present the Customer Collaboration Financial Model results and findings to the Customer for approval.
  o **Deliverable: Customer Collaboration Financial Model (includes investment plan for Future State Architecture)**

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

• Work with Cisco Services architect and analysts to schedule activities.
• Submit to the Cisco Services the necessary business and financial metrics related information as needed.
• Schedule participants to attend the Business Case Justification Workshop and conduct and interviews
• Create the Customer Collaboration Financial Model Report detailing findings and recommendations
• Review and approve the Customer Collaboration Financial Model Report and validate the business case.

6.10. **UCC Custom Engineering Subject Matter Expert Consulting (COS OS UCC-CSME)**

The UCC Custom Engineering SME Consulting offering helps Customers during design, development, and test phases of custom desktop development. The SME Consulting service provides access to a Cisco Subject Matter Expert for the contracted number of hours in order to help answer questions, perform knowledge transfer as well as provide direction and best practices around custom development issues. This service is consulting only and does not provide any deliverables.

**Cisco Responsibilities**

• Schedule and hold Customer kick off meeting and share contact information.
• Provide SME consulting services to Customer upon customer request (email, phone call).

**Customer Responsibilities**

• Designate a single point of contact for all Cisco communication. This person has the authority to act on all aspects of the work being performed.
• Designate a backup contact when Customer contact is unavailable. This person has the authority to act on all aspects of the work being performed in absence of the primary contact.
• Attend the kick off meeting.
• Contact Cisco SME consultant as need to request SME consulting services.

6.11. **UCC Migration Strategy Planning (COS OS UCC-MIG)**

The Customer Collaboration Migration Strategy Planning Service helps Customers to accelerate the migration from their legacy contact center solution to a new Customer collaboration platform. This service focuses on the “how” to properly plan for a smooth migration. Customer Collaboration Migration Strategy Planning Service will help Customers with assessing your current contact center environment and support personnel readiness, conducting business and technology discovery workshops and interviews to capture business goals and objectives that will define your Customer Collaboration solution and define an execution plan to successful drive a Customer’s migration strategy.

The service may include one or more of the following offerings:

- Customer Collaboration Migration Readiness Assessment
- Customer Collaboration Migration Planning

**Customer Collaboration Migration Readiness Assessment**

The Customer Collaboration Migration Readiness Assessment reviews a Customer’s business processes, agent and Customer experiences, business/metrics elements and business reporting, Customer technology strategies and IT Operations and support processes that help run the Customer Collaboration environment. The assessment is conducted remotely via an interview and completion of a Migration Readiness Assessment Questionnaire. The Migration Readiness Assessment Report identifies areas of potential readiness gaps and provides recommendations to mitigate risks prior to migrating to a UCCE solution.

**Cisco Responsibilities**

- Schedule and conduct a Migration Readiness Assessment Questionnaire review session with Customer.
- Conduct a Migration Readiness Assessment Questionnaire response review session with Customer to validate responses provided and determine if any information is missing.
- Analyze, identify and create Migration Readiness Assessment Report document highlighting potential gaps and risks based on Customer provided Migration Readiness Assessment Questionnaire responses.
- Conduct Migration Readiness Assessment readout session with Customer to present findings.
- Deliver Migration Readiness Assessment Report and obtain Customer sign-off.
  
  o **Deliverable: Customer Collaboration Migration Readiness Assessment Report**

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Provide knowledgeable support personnel to gather information necessary to complete the Migration Risk Assessment Questionnaire.
- Schedule meeting with personnel responsible for completing the Migration Risk Assessment Questionnaire.
- Attend the Migration Risk Assessment Response review session to discuss the responses submitted on the Migration Risk Assessment Questionnaire.
- Provide Cisco Engineers with all outstanding answers to questions within five (5) business days.
- Customer will participate in the review of the completed Migration Risk Assessment Report Deliverable, and will acknowledge their receipt of the Deliverable by signing the Deliverable.

**Customer Collaboration Migration Planning**

Cisco Customer Collaboration Migration Planning helps Customers in developing a cross functional migration strategy focusing on the people, process and technology areas. The Migration Planning Service helps the Customer review their contact center strategy by leading a discovery process that focuses on four specific areas: Agent & Customer experience, Business Metrics and Reporting, Operation Management Readiness and Architecture and Technology.

**Customer Collaboration Business Migration Discovery Service**
The Customer Collaboration Business Migration Discovery Service review Customer business processes, agent and Customer experiences and business/metrics elements that help run the business. The workshops include interviews with Customer collaboration center personnel to help define interactions and processes. The workshops identify and help mitigate potential gaps and risks when defining a clear strategy and execution plan for migration to a UCCE solution by aligning goals and objectives to the migration strategy. The Customer Collaboration Business Migration Report will document the findings and recommendations.

Cisco Responsibilities

- Schedule and conduct cross-functional interviews and workshops to gather information necessary to document the business requirements.
- Analyze, and validate feature and/or functional gaps that deviate from the original Customer requirements and contact center applications, system integrations, and any other areas as determined.
- Document the reporting requirements based on use of existing reporting tools and packages.
- Document and validate potential future growth, changes in the existing or proposed Unified Contact Center, network infrastructure, voice infrastructure, database, third party integrations, and any other areas that could impact the project planning.
- Identify and document the gaps and risks.
- Create the Customer Collaboration Business Migration Report and review findings and recommendations with the Customer for sign off.
  
  o Deliverable: Customer Collaboration Business Migration Report

Customer Responsibilities

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Provide knowledgeable support personnel to participate in cross-functional interviews to gather information necessary to document the functional specification.
- Identify and schedule individuals to assist in interviewing and document information from business owners and Customer collaboration center resources.
- Identify and schedule the support personnel responsible for contact center reporting to gather information to define requirements for the reporting requirements.
- Arrange for security access for Cisco Personnel at designate Customer sites where discovery workshops will be performed.
- Provide Cisco Network Consulting Engineers with answers to all the questions asked during the interview process in a timely manner. Any outstanding answers to questions during the interview process are required prior to starting the assessment.
- Customer will participate in the review of the completed Customer Collaboration Business Migration Report Deliverable, and will acknowledge their receipt of the Deliverable by signing the Deliverable.

Customer Collaboration Technology Migration Discovery Workshop

The Technology Discovery Workshops review Customer technology strategies and IT Operations and support processes that help run the business. The workshops include interviews with Customer personnel to help discovery existing processes. The workshops identify and help mitigate potential gaps and risks when defining a clear strategy and execution plan for migration to a Unified Contact Center Enterprise (UCCE) solution. The Customer Collaboration High Level Migration Execution Plan will document the findings and recommendations.

Cisco Responsibilities

- Schedule and conduct cross-functional interviews and workshops to gather information necessary to document the business requirements.
- Obtain Customer’s up-to-date network topology diagrams for the sites to be assessed along with information about current network architecture, configurations of these devices, network usage requirements, design goals, security policy and utilization reports including past month utilization reports from service provider(s).
- Conduct interviews with key members of Customer’s organization, involved with the existing data and voice infrastructure. Individuals that need to be interviewed are as follows (additional individuals may be identified and requested based on requirements network architecture and/or solution) including the following Customer personnel: LAN design/engineering manager and lead engineer, architecture/engineering manager and network architect, telecom services manager and lead service engineer, voicemail lead, new deployment testing manager, test engineer or equivalent, telecoms Services/operations Manager and lead support person, network management or tools manager and lead engineer, performance/capacity manager.
(data and telecom), installation and network facilities manager (responsible for power/environment) and network security office or lead person.

- Document and validate contact center feature and/or functional gaps that deviate from the original Customer requirements and applications, system integrations, and any other areas as determined.

- Create the Customer Collaboration High Level Migration Execution Plan and review findings and recommendations with the Customer for sign off.
  
  Deliverable: Customer Collaboration High Level Migration Execution Plan

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:

- Customer is responsible for communicating and scheduling personnel to attend the kick off meeting and interviews.

- Provide knowledgeable support personnel to participate in cross-functional interviews to gather information necessary to document the functional specification.

- Identify the appropriate staff members involved at each site and co-ordinate the scheduling for all meetings and data gathering.

- Provide Cisco Services Engineers with up-to-date network topology diagrams and information about the current network architecture, configuration of these devices, network usage requirements, design goals, security policy and following utilization reports.

- Arrange for security access for Cisco Personnel at designate Customer sites where discovery workshops will be performed.

- Provide Cisco Network Consulting Engineers with answers to all the questions asked during the interview process in a timely manner. Any outstanding answers to questions during the interview process are required prior to starting the assessment.

- Participate in the review of the completed Customer Collaboration High Level Migration Execution Plan Deliverable, and will acknowledge their receipt of the Deliverable by signing the Deliverable.

6.12. UCC Incident Management Support (COS OM UCC-IM)

The Customer Collaboration Incident Management Support Service provides assistance with Cisco TAC escalations related to the Customer’s Unified Contact Center Solution. The Cisco project manager will assign a Cisco Services Engineer to review the documented open events and cases with the TAC organization, track to resolution, while keeping Customer apprised of the progress and document findings including root cause analysis and recommendations. Customer must open a trouble ticket through Cisco TAC. Customer should notify the Cisco engineer of the specific trouble ticket to track.

Cisco Responsibilities

- Provide TAC Escalation assistance after the Customer follows the proper TAC procedures and proper escalation process.

- Collaborate with Cisco TAC regarding the Customer’s Unified Contact Center environment to assist Cisco TAC and the Cisco Contact Center Business Unit (CCBU) in resolving the incident.

- The project manager will assign a Cisco Services engineer to remotely track and help with the resolution of the issue(s) related Unified Contact Center components only.

- The Cisco Services engineer will provide remote support to Customer in dealing with open P1 and P2 cases. The Cisco Service engineer will monitor, assist and escalate when necessary to help resolve these issues. Cisco TAC is responsible for the case.

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:

- Users contacting the Customer’s support desk or resolution center for assistance in connection with their Unified Contact Center Network or service problems or issues.

- Open a ticket with Cisco Technical Assistance Center and Cisco TAC has performed diagnostics prior to contacting Cisco Services for support.

- Notification to Cisco Service of the open ticket needing assistance and provide Cisco TAC case number

- Customer shall not escalate any Unified Contact Center problems or issues until Cisco TAC has performed diagnostics.

- Customer understands that the Incident Management Support Service will be performed remotely and Cisco Services Engineer will work cases during Standard Business Hours.
Customer understands and acknowledges that the following are not provided or a part of the Incident Management Support Service:

- Cisco Services Engineer does not make any changes to the Customer production environment.
- P3/P4 TAC cases.
- Onsite presence for TAC case support
- Incident Management Support does not replace Cisco TAC Support services.


The Customer Collaboration Operations Support Health Check provides a Customer the opportunity to review original findings and assess changes to those recommendations. The Customer Collaboration Operations Support Health Check will evaluate the progress since the last review and outlines gaps and provide recommendations.

**Cisco Responsibilities**

- Schedule a virtual Customer Collaboration Operations Support Health Check meeting with Customer.
- Review findings of last review and determine areas the Customer improved support operation.
- Assess new documentation, process and procedures.
- Present the Operations Support Health Check Report to the Customer for approval.

  - **Deliverables:** Operations Support Health Check Report

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Identify Customer’s executive sponsor(s) and key stakeholder(s) and provide their roles in supporting this project.
- Submit to Cisco information and documentation related to the changes since the last Operations Support Review.
- Review and approve the Operations Support Health Check Report findings and recommendations.

7. **Unified Communications Services**

7.1. **UC Security Assessment (COS AA UC-SECA)**

The Unified Communications (UC) Security Assessment provides Customers with a security assessment report, recommendations and risk analysis of four critical solution elements:

- Cisco UC Network Infrastructure Security: includes switches, routers and connecting links comprising the foundation network that carries IP data, voice and video traffic.
- Cisco UC Call Processing Security Features: includes servers, and router-based call processing systems for call management and control.
- Cisco UC Endpoint Security: includes Cisco Unified IP phones, soft phones, video terminals and devices that connect to the IP network.
- Cisco UC Applications Security – includes user applications such as unified messaging, conferencing, Customer contact, and custom tools extend the capabilities of IP Communications systems.

**Cisco Responsibilities**

- Schedule UC Security Assessment Discovery and Data Gathering activities with the Customer
• Conduct UC Security Audit discovery on the UC infrastructure and UC components and a UC Security Assessment and Data Analysis to gather data to document the UC Security Assessment

• Analyze and create the UC Security Assessment Report documenting recommendations and UC Security Assessment findings and provide best practice recommendations to mitigate the risks found in the UC environment.

• Present and review the UC Security Assessment Report to the Customer for approval.
  o Deliverable: UC Security Assessment Report

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:

• Up-to-date Cisco Unified Communications (UC) infrastructure topology diagrams and information about the current architecture, configuration, devices, and security policy.

• Ensure that no changes are made to the Cisco UC infrastructure while UC Security Assessment is in progress, which may take up to 4 weeks depending on the complexity of the environment.

• A security exemption to utilize any Cisco or third-party software on their network for the use of data inventory gathering, performance.

• Assist with Cisco Services Engineers in providing answers to all the questions asked during the interview process within three (3) business days.

• Meet with Cisco UC Security Assessment team for initial screening and review the UC Security Assessment Report draft.

• Review the UC Security Assessment Report and approval.

7.2. **UC Business Alignment (COS AA UC-BA)**

The Unified Communications (UC) Business Alignment Service provides a strategy and business alignment "check-up" through a review of business requirements/imperatives and planned Cisco UC initiatives.

**Cisco Responsibilities**

• Conduct up to ten (10) business stakeholder interviews to identify possible Cisco UC and related business transformation opportunities.
  
  • Review existing Cisco UC and Collaboration technology network infrastructure and service catalog.
  
  • Review of Customer Cisco UC technology architecture and strategy.
  
  • Review of Customer business imperatives and key enterprise applications..
  
  • Identify two (2) business benefit use cases.
  
  • Summarize findings and provide Cisco UC Business Alignment Report recommendations

• Facilitation via meetings or workshop to discuss identified business collaboration/application optimization opportunities.

• Present and review the UC Business Alignment Report to the Customer for approval.
  o Deliverable: UC Business Alignment Report

**Customer Responsibilities**
In addition to the General Customer Responsibilities, Customer shall provide the following:

• Work with the appropriate IT and business stakeholders to schedule discussions and distribute workshop invitations.

• Review with Cisco during the stakeholder interviews any Cisco UC and related business transformation opportunities

• Provide the following:
  
  • Existing Cisco UC and Collaboration technology network infrastructure and service catalog
  
  • Existing Cisco UC technology architecture and strategy
  
  • Existing business imperatives and key enterprise applications
  
  • Assist Cisco in developing two (2) business benefit use cases
- Schedule interview resources to discuss the Cisco Unified Communications (Cisco UC) Solution and business initiative.
- Review and approve the findings in the UC Business Alignment Report

### 7.3. **Collaboration Edge Security Audit (COS AA UC-ESA)**

The Collaboration Edge Security Audit provides ongoing detection and prevention from Telephony Denial of Service (TDOS), Voice Fraud, Modem & Network Security, Service Abuse & Financial Losses, Harassing/Threatening and/or Restricted Calls, and Compliance & Data Leakage at the Customer’s Collaboration/Voice application layer. Utilizing Cisco Collaboration Tool(s) and providing Reporting & Analysis, Cisco will perform ongoing monitoring and policy enforcement. The Collaboration Edge Security Audit service provides quarterly analysis of the Customer’s voice traffic and associated infrastructure and provides recommended changes (policies, security design, best practices, thresholds, alerts, etc.).

**Cisco Responsibilities**
- Schedule remote kick off meeting with the Customer to discuss the Customer’s voice infrastructure and requirements.
- Collect Customer’s Unified Communication/Collaboration environment specific data including, but not limited to, number of sites/users, PPRis, signaling protocols and IOS version running on Gateway/Trunk devices, SRE module availability or lack thereof, UC/Voice security infrastructure, Customer’s business requirements, etc.
- Determine Customer’s gateway (IOS) code version and recommend code upgrades if necessary.
- Perform ISR device setup, including voice gateway/trunk configuration.
- Depending on Customer’s infrastructure and requirements, perform Cisco Collaboration Tool(s) installation and configuration.
- Verify connectivity between Collaboration Tool(s) and Customer’s devices.
- Conduct a Collaboration/Voice Security Discovery Workshop with Customer to determine the appropriate alerts and thresholds to configure.
- Monitor Customer voice traffic and create a baseline for security analysis and reporting.
- Create and respond to alerts and thresholds, as needed, on an ongoing periodic basis.
- Perform data collection of voice traffic over a period of time, and review data for malicious voice activity.
- Prepare and present Collaboration Edge Security Audit to Customer.
- Provide recommendations on policies, Collaboration Security best practices, thresholds, and alerts based upon previous activities and Audit report.
- Perform and/or recommend (as applicable) changes to policies, thresholds, and alerts as previously agreed upon between Cisco and Customer.

**Deliverable:** Collaboration Edge Security Audit

**Customer Responsibilities**
In addition to the General Customer Responsibilities, Customer shall provide the following:
- Attend kick off meeting and provide Cisco with voice infrastructure and requirements.
- Provide required information to Cisco Services team as needed.
- Attend Voice Discovery Workshop (as needed) with Cisco to provide information regarding trunks, voice requirements, etc.
- Perform necessary code upgrades as recommended by Cisco on Customer devices.
- Assist Cisco to perform voice gateway configuration as needed.
- Provide Cisco with remote and/or on-site assistance in installing and configuring Cisco Collaboration Tool(s).
- Review the Collaboration Edge Security Audit with Cisco and provide feedback regarding voice traffic activity.

### 7.4. **Program Management Best Practices (COS AA UC-PMO-BP)**
The Program Management Best Practices is an interactive, half-day, onsite workshop covering Collaboration Solutions deployment best practices. The workshop focuses on best practices for various program elements, including organization change management, vendor management, migration strategy, top-ten lessons learned, operational readiness, governance strategy, and more. In preparation for the workshop, Cisco will prepare an extensive, customized slide presentation geared toward Customer’s specific experience with Collaboration technologies, Customer needs, and specific areas of concern. A high-level discussion on gaps, impacts, and recommendations is included.

**Cisco Responsibilities**
- Develop a comprehensive presentation covering collaboration best practices and tailored to Customer’s needs, to include:
  - Solution testing strategies, deployment strategies, training strategies, adoption strategies, program management, Collaboration Tools, and operational support readiness
- Conduct an onsite Program Management Best Practices Workshop
- Provide high-level gap identification, including gap impact and recommendations
- Provide Program Management Best Practices Presentation to Customer
  - Deliverable: Program Management Best Practices Presentation

**Customer Responsibilities**
In addition to the General Customer Responsibilities, Customer shall provide the following:
- Appropriate resources required to attend the workshop
- Provide a suitable location for onsite delivery of the workshop

### 7.5. Program Management Gap Analysis (COS AA UC-PMO-GA)

The Program Management Gap Analysis service will provide Customer with a detailed list of gaps and recommendations for corrective action. Cisco will collaborate with Customer to assess and identify gaps in all aspects of the program from a people, process and tools perspective to include the following areas: migration strategy, component inclusion, vendor management, operations/support, organization change management and more. Once gaps have been fully identified, the Cisco Program Manager will analyze the identified gaps for program impact and document these gaps, develop recommendation(s) for corrective action and explain potential risks if corrective actions are not implemented.

As part of the analysis, the Customer’s program will be evaluated in numerous areas. This includes analysis from a people, process, and tools perspective in all critical areas. Some of these critical areas include: operational readiness, program management, migration strategy, and component inclusion.

**Cisco Responsibilities**
- Collaborate in-depth with Customer to understand abilities, experience, resources, business drivers, pain points, and work on identifying gaps in one or more of the following areas:
  - Governance
  - Program documentation and plans: Scope statement, program roadmap, program management plan
  - Component management plans: Governance management plan, stakeholder management plan, communication plan, benefits realization plan, resource plan, procurement plan, benefits transition plan, and risk management plan
  - Program schedule
  - Program actions, issues, risks, and responses log
  - Develop program architecture (component projects)
  - Adoption/awareness
  - Deployment/migrations
  - Operational readiness
  - Vendor management
  - Testing strategy
• Other areas as deemed necessary by Cisco Program Manager
• Consult with Customer to understand the identified gap’s impacts and recommend feasible solutions based on the gap’s priority and severity.
• Provide Customer with a Program Management Gap Analysis Report
• Provide onsite executive review of the analysis and finding to executive and key stakeholders of the program
  o Deliverable: Program Management Gap Analysis Report

Customer Responsibilities
In addition to the General Customer Responsibilities, Customer shall provide the following:
• Pricing information and feedback as requested by Cisco in order to determine current state and identify gaps
• Provide requested information within three (3) business days
• Participate in the formal executive level review session

7.6. **UC Implementation Support Service (COS OS UC-IS)**

The Unified Communication (UC) Implementation Support Service is designed to provide a smooth transition from the Customer’s Planning and Design phase and provide the Customer with a remote subject matter expert(s) as a mentor to support network implementation or expansion of a designed Cisco Unified Communications Solution.

The UC Implementation Support Service will provide the Customer with remediation support to the recommendations found in other Optimization Services such as UC Stability Audit and UC ORMA. The Cisco Services Engineer will work with the appropriate Customer personnel to help implement changes deemed necessary and address any recommendations for future planning and designs. Remediation issues range from low, medium, and high priority with varying level of complexity in implementation.

**Cisco Responsibilities**
• Cisco Services Engineer will act as a subject matter expert to mentor the Customer’s implementation team.
• Review the Customer’s Implementation Plan and other pertinent documents for potential gaps, risks and or best practice issues.
• If applicable, review and analyze the UC Stability Audit and Collaboration Operations Risk Management Analysis Reports to address findings and recommendations.
• Work with Customer during implementation to provide recommendations in order to address any integration issues.
• Provide remote assistance for Customer cutover activities as per agreed upon schedule with Customer.
• Provide direct Cisco Technical Assistance Center (Cisco TAC) escalation support if needed during implementation, and involve a virtual support team as necessary.
• Work with the Cisco TAC concerning Severity-1 (S1) or S2 issues during implementation and Day 1 (First day of Post Implementation).
• Perform limited verification work in a Cisco lab in order to validate questions and recommendations.
• Develop any remediation changes and test in a Cisco lab to verify.
• Assist Customer with initiating any change control processes accordingly.
• Provide consultative support and guidance to Customer in helping Customer understand required changes for remediation.
• Cisco will not perform any changes or modifications to Customer’s environment.

**Customer Responsibilities**
In addition to the General Customer Responsibilities, Customer shall provide the following:
• Open cases with Cisco Technical Assistance Center (Cisco TAC) for all reactive issues. This helps the Cisco Services Engineer or Cisco TAC to engage development engineers if the resolution involves bug fixes, etc.
• Option to purchase additional Implementation Support hours to ensure continuation of the support, otherwise the Cisco Service Engineer will be removed at the end of the agreed funded engagement.
• Submit to Cisco with required documentation within three (3) business days from date of requested.
• Work with Cisco Services Engineer to schedule availability of remote assistance for Customer cutover activities.
• Appropriate physical and remote access sufficient for Cisco to perform mentor duties.
• Assign project management team to manage and own all aspects of the Cisco Unified Communications implementation.
• Assign personnel certified to perform the Cisco UC tasks and any onsite Implementation duties required for implementation for the duration.
• Perform solution implementation to include: installation of Software, provisioning of Cisco UC platforms.

7.7. **UC Bulk Automation Support (COS OS UC-BULK)**

The UC Bulk Automation Support service provides remote assistance for Customer in performing bulk move/add/change/deletion (MACD) to Customer’s CUCM cluster locations. Cisco will provide guidance and best practices in performing user data changes. No onsite assistance is provided and any request to perform such is subject to Cisco’s sole discretion and Customer will responsible for any costs associated with such onsite visit.

**Cisco Responsibilities**

- Define the process to export required data from CUCM cluster locations.
- Provide access to Cisco’s Collaboration Tool(s) to efficiently import and export required data.
- Provide data management and manipulation to have users associated to correct devices, description tagging.
- Assess data readiness for import back into CUCM cluster locations.
- Perform data manipulation to format the data to be ready to be uploaded into CUCM clusters.
  - Associate the end user to the correct device(s)
  - Update the device description on each device to match a specific GS format
- Provide manipulated data to Customer.
- Provide remote support to Customer during the data retrieval and uploading activities.

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Provide at least two (2) suitably skilled and trained resources to operate Cisco’s Collaboration Tools.
- Provide remote access to enable Cisco to provide support.
- Customer is the governing authority of the support services provided by Cisco and retains full responsibility for the leadership, review, and approval of actions taken.
- Install Cisco provided Collaboration Tool(s) on Customer’s local server or laptop.
- Customer will use the Collaboration Tool(s) to retrieve data with Cisco support via WebEx.
- Provide the collected data to Cisco for it to be prepared for upload.
- Customer will use the Collaboration Tool(s) to upload the data that Cisco has manipulated and provided.
- Customer will return or remove the Collaboration Tool(s) provided by Cisco.

7.8. **Cisco Collaboration Automation Services (COS OS UC-CAS)**

The Collaboration Automation Services provide a portfolio of service offerings designed to assist Customer provisioning, testing, analytics and orchestration services in aligning IT requirements with business priorities and imperatives. Using these service offerings, Customer will drive more business value and productivity savings from technology.
The entire Collaboration Automation Services engagement may include multiple services delivered either as a standalone module, or multiple services delivered in tandem. See below for some of these high-level activities and deliverables in this service offering.

**Collaboration Data Services**
The Collaboration Data Service employs tools that collect information about how the Collaboration solution is being used.

**Cisco Responsibilities**
- Assist in the deployment of tools necessary for the delivery of the service
- Review and generate reports at pre-determined frequency
- Provide reports to Customer at pre-determined frequency
  - **Deliverable: Collaboration Data Service Report**

**Customer Responsibilities**
In addition to the General Customer Responsibilities, Customer shall provide the following:
- Work with Cisco to schedule activities
- Appropriate physical and remote access sufficient for Cisco to perform collaboration data service analysis
- Provide Cisco with necessary technical and business metrics related information required for collaboration data service analysis
- Review analysis of current state and business priorities for accuracy
- Review business insight metrics recommendations.
- Review documentation and reports provided
- Present the Collaboration Data Service Report executive readout to key stakeholders for review and approval.
- Attend quarterly reviews with Cisco

**Collaboration Provisioning & Day 2 Automation Services**
Collaboration Provisioning & Day 2 Automation Services are targeted at increasing productivity and bringing consistency in performing Cisco Unified Collaboration product provisioning and process orchestrated workflows to facilitate web-based data entry.

**Cisco Responsibilities**
- Work with Customer to understand the requirements and scope of implementation project(s)
- Setup and configure provisioning tool based on customer requirements
  - **Deliverable: Provisioning templates & Knowledge transfer materials, as needed**

**Customer Responsibilities**
In addition to the General Customer Responsibilities, Customer shall provide the following:
- Work with Cisco to define the requirements and scope of implementation project(s)

**Collaboration Testing Automation Services**
Services to validate and certify migrations, implementations and remediation activities with Cisco Unified Communication Manager, Cisco Unity Connection and Cisco Collaboration infrastructure (end points, gateways, etc).

**Cisco Responsibilities**
- Work with Customer to understand the testing requirements and scope of implementation project(s)
Assist in the deployment of tools necessary for the delivery of the service

- Deliverable: Customer specific Collaboration Testing Automation Services Architecture Design

### Customer Responsibilities

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Work with Cisco to define the testing requirements and scope of implementation project(s)
- Customer to provide necessary infrastructure to support Collaboration Testing Automation Services architectural design

### 7.9. Program Management Planning (COS OS UC-PMO-PMP)

The Program Management Planning service assists the Customer in setting up the overall program by performing activities that are deemed a necessity by industry methodologies to manage, govern, and deliver a successful Collaboration Solution program. The Collaboration Program Manager will assess and work with the Customer to determine the appropriate combination of plans and activities to facilitate success. To confirm best practices are followed and adhered to, some of the setup activities will include a variety of industry-standard program management plans and collateral, including creating a program scope statement, governance management plan, and a stakeholder management plan.

### Cisco Responsibilities

- Provide onsite and remote interaction with the Customer to understand the current program’s strengths and weaknesses
- Collaborate with the Customer’s sponsors and stakeholders to understand and define program business requirements and scope and then document within industry standard
- Identify a combination of program setup deliverables that are required to facilitate program success
- Identify and assess program issues, risks, and responses
- Incorporate identified gaps, resolution development and implementation
- Identify stakeholders and provide stakeholder analysis
- Lead project managers to create required deliverables
- Participate in relevant Customer and vendor meetings
- Provide direction and oversight on organizational change management and operational readiness activities

### Customer Responsibilities

In addition to the General Customer Responsibilities, Customer shall provide the following:

- Identify Customer’s executive sponsors and key stakeholder and define their role
- Work with the Cisco Program Manager to ensure the Customer’s executive sponsor, key stakeholders and all project team members receive project communications and are included in regularly scheduled communications sessions
- Enable proper authority to the Cisco Program Manager to direct and lead Customer and vendor project and team members as required to successfully plan the program
- Identify Customer and vendor project managers for the various component projects
- Develop project schedules & WBSs per the Cisco Program Managers direction
- Participate in regularly scheduled program review meetings or conference calls.
- Provide proper executive attention to escalated issues and risks and provide timely sign-off or acceptance of an action plan
- Participate in program governance per the governance plan
- Unless otherwise agreed to by the parties, ensuring that Cisco’s request for information or documentation needed for the project is met within two (2) business days of Cisco’s request
- Supply the workplace policies, conditions and environment in effect at the Customer site
• Supply on-site workspace and facilities, including badged access, internet and telephone connectivity

• Participate in the review and approval of the Program Management Plan

7.10. **Program Management Consulting (COS AA UC-PMO-PMC)**

The Program Management Consulting service will assist the Customer by executing the program on Customer’s behalf or in alignment with Customer assigned program manager. To facilitate program success and realize associated benefits, execution of the program will follow the plans created during the Program Management Planning phase. The Cisco Program Manager will confirm the plans are followed and, as needed, identify any existing gaps, implement resolutions, participate in governance and steering committee meetings, and enable continual improvement and adaptation of the program.

If the program is already underway, the Cisco Program Manager will assist in execution by implementing critical best practices. This may require fundamental Program Management Plans to be created during the execution phase of the program. The Cisco Program Manager will act as the holistic program manager, having a view into all of the program’s component projects. They will work with and manage relationships with Cisco, vendors, and Customer resources/PMs to manage and track interdependencies at the program level.

In addition, the Cisco Program Manager will manage program-level issues, risks, and escalate as required to ensure best practice alignment in all areas of the program to include: operations, organization change management, vendor management, migration strategy and more.

**Cisco Responsibilities**

• Work with Cisco, vendor and Customer project managers to identify and track interdependencies of schedules at the program level

• Manage and execute various program elements which may include:
  • Program Scope
  • Program Schedule
  • Stakeholder Management
  • Program Risks (Identification, analysis and response planning)
  • Program Issues (Resolution, acceptance and escalation)
  • Program Changes per the defined change control process

• Report performance per the communications plan

• Provide governance oversight and ensure the governance processes are execute per the governance management plan

• Participate in, or lead, program governance meetings per the governance management plan

• Participate in any organizational or portfolio level governance board or steering committee meetings

• Monitor and report the program benefits per the benefits realization plan

• Develop standardized format for issues, risks, status reporting and other communications.

• Develop a Program Management Transition Plan and transition the program to the Customer Program Manager

  o **Deliverable: Program Performance Reports, and Program Transition Plan**

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

• Identify Customer’s executive sponsors and key stakeholder and define their role

• Work with the Cisco Program Manager to ensure the Customer’s executive sponsor, key stakeholders and all project team members receive project communications and are included in regularly scheduled communications sessions.

• Enable proper authority to the Cisco Program Manager to direct and lead Customer and vendor project and team members as required to successfully plan and execute the program.

• Participate in regularly scheduled project review meetings or conference calls.

• Provide proper executive attention to escalated issues and risks and provide timely sign-off or acceptance of an action plan

• Participate in program governance per the governance management plan
• Coordinate with any external third party, such as in-country Carrier/Telco, activities, deliverables and schedules and designate authority to the Cisco Program Manager to manage these resources.

• Unless otherwise agreed to by the parties, ensuring that Cisco’s request for information or documentation needed for the project is met within two (2) business days of Cisco’s request.

• Supply the workplace policies, conditions and environment in effect at the Customer site.

• Supply on-site workspace and facilities, including internet and telephone connectivity.

• Participate in the review and approval of the Program Management Transition Plan.

7.11. **UC Operational Runbook Development (COS OM UC-RB)**

The UC Operational Runbook Development Service provides the Customer with a reference material for proactive and reactive support, as well as reporting and capacity management. A Runbook is defined as a compilation of procedures and operations which provide step-by-step decision trees and directions to determine the effective course of action given a particular scenario. Cisco will conduct a remote requirements workshop to gather the Customer requirements and jointly develop a table of contents. Cisco will then develop the Runbook and provide it to the Customer.

**Cisco Responsibilities**

- Develop detailed Runbook documentation including:
  - Proactive Monitoring
    - Develop recommendations for monitoring system elements of the UC product.
  - CPU, Memory, Disk, IO, Interface
  - Hardware Environmental
  - Service and Process
  - Database Replication
    - Product specific values (CUCM Calls Processing Status, CUC Message activity, etc.)
    - Detail the monitoring protocol options (SNMP, Web Services, CLI, etc.).
  - Reactive Alerting
    - Provide comprehensive Alarm List (Syslog) for the UC Product’s Alarm Database.
    - Provide recommended actions based on Alarm details.
  - Detailed overview of Real Time Monitoring Tool alerts (if applicable).
  - Troubleshooting
    - Identify top service issues that occur and provide step by step troubleshooting approach.
    - Correlate alarms and alerting to service issues.
    - Service issues will include be customized to protocols, features and product based on Customer environment.
    - Tracing recommendations for issue.
    - Preparation details for opening TAC cases.
  - Tools
    - Overview of tools available for UC Product.
    - Best practices for Trace and Log Storage.
    - Best Practices for scheduled maintenance tasks.
  - Reports
    - Detail reporting capabilities of the UC Product.
• Provide Best Practices on report usage.
• Capacity Management
• Develop best practices for Capacity Management (CPU, virtual memory, disk space, license manager, etc.)
• Provide comprehensive Performance Monitoring (Perfmon) list for the UC Product.
• Provide draft copy to Customer for review.
• Provide Review of Cisco Runbook documentation for hand-off to Operational personnel.
• Updates after final document is delivered will need to be a separate engagement.
• Review Customer changes/Customer-supplied documentation as part of ongoing contract.

  o **Deliverable: Operational Runbook**

**Customer Responsibilities**

In addition to the General Customer Responsibilities, Customer shall provide the following:

• Provide the names of the employees to work with Cisco engineers during the Runbook creation.
• Provide current monitoring and management topologies and IP information.
• Provide feedback and direction on alerting and threshold requirements.
• Provide current alarm and performance data for existing UC Deployment (if applicable).
• Implement Runbook Best Practices, Alerting configuration and scheduled tasks.
• Customer will review drafts provided by Cisco.
• Customer to provide acceptance of Cisco final document.
• Customer is the governing authority of the support services provided by Cisco and retains full responsibility for the leadership, review, and approval of actions taken.