

FREE Digital Transformation Discovery Engagement (Example SOW)

Caddis Digital Solutions, LLC



Summary

The cloud assessment process is designed to assist *CLIENT* with planning the future of their IT infrastructure with a focus on the highest-priority applications for the success of the business. As part of this process *Caddis Digital Solutions* will work with *CLIENT* to inventory and understand all IT assets and provide a "Cloud Roadmap" for *CLIENT* to follow on their cloud journey.

Key Assumptions

- *Caddis Digital Solutions* has been permitted to access *CLIENT* facilities and/or systems for the purpose of installing data collection appliances or has been provided with an internal POC who can assist with that process.
- *Caddis Digital Solutions* will be provided with a list of relevant stakeholders/teams at *CLIENT*, including the business, IT, security, and development teams responsible for and/or reliant on applications identified in the process as deserving of further evaluation
- Deliverable definitions are estimates and may evolve or change through detailed planning sessions with *CLIENT*.

Current State Discovery

Caddis Digital Solutions will work with *CLIENT* through interviews and meetings with their development, infrastructure, security, and business teams to determine the current state of their multi-cloud environment. These interviews will first work to identify the most mission critical applications, defined as those that meet one or more of the following criteria:

- Responsible for a significant amount of revenue
- Core to a strategic initiative
- Highly visible to end customers or the executive team
- High costs of downtime

Once the mission-critical applications have been identified *Caddis Digital Solutions* will arrange additional meetings with the technical and business teams to identify the current status of the application, the ideal end-state, and a high-level explanation of the process for getting there. These interviews will focus primarily on the following aspects of the app (additional details and questions in attached doc).

- Current pain points with the application
 - Downtime
 - High costs
 - Slow development

- Highest priorities for the future
 - Stability
 - Speed of development
 - Application performance
 - Cost control
- Business requirements
 - Availability
 - Costs
 - Data locality

In addition to the interview process *Caddis Digital Solutions* will run a tool-based discovery against *CLIENT*'s environment(s) for a full inventory of machines and services currently used across their computing environments. This tool-based inventory will group machines by the application(s) they support and include:

- OS information
- Hardware specs
- Installed software
- Other machines the server communicates with

Cloud Requirements and Plans

Caddis Digital Solutions will leverage the information gathered during the interview process and with the tools-based inventory to review each of the applications identified as mission-critical during the early portion of the discovery process and identify the correct path for meeting the defined requirements of the business. These recommendations will focus on delivering a roadmap that meets the following criteria:

- Meets the identified business goals
- Keeps costs low
- Minimizes disruption to *CLIENT*'s operations

Alongside the mission-critical application deep-dives *Caddis Digital Solutions* will also perform a more cursory review of all assets identified during the tool-based discovery and sort them into one of several "buckets" such as "refactor" "lift and shift" or "retire" based on the technical information available from the inventory.



Deliverables

Inventory Reports – Basic report(s) detailing *CLIENT*'s current environment. These reports are primarily used to inform the recommendations made in the cloud roadmap but can also be useful for general migration planning and cost modeling. The report(s) will include the following information for each server:

- Operating System version
- Configured hardware specs
 - CPU
 - Memory
 - Disk
- Snapshot of resource utilization
- List of installed software
- Mapping of servers > applications

Cloud Roadmap

This document will describe the current state of the high-value applications in the client environment, a recommended end-state for those applications, and an actionable plan to get to the desired end state while delivering incremental improvements, maintaining availability and compliance requirements, and delivering on the business' goals.

The roadmap has two main components.

1. A general plan for all applications in the environment that places them in a number of different buckets:
 - a. Lift and shift
 - b. Refactor
 - c. Retire
2. A deep-dive into a few (typically 3-5) high-value applications on the clients network that demonstrates it's current state, the business goals/requirements/pain points surrounding it, and outlines our suggestions for its future development and operation in the cloud. There will be three phases for each application
 - a. Current
 - i. Current technical and architecture details
 - ii. Current challenges
 - iii. Highest priorities for a new solution
 - b. Ideal end-state
 - i. Location of workload
 - ii. Overall architecture
 - iii. Explanation of how this meets the Identified goals



- c. In-between state
 - i. High-level plan for moving from current to end-state
 - ii. Details risk mitigations
 - iii. Includes breakdown of client/*Caddis Digital Solutions* responsibilities if the project is pursued.

Client Responsibilities

CLIENT will assign a primary contact for all assessment-related communications, interview scheduling, installation of any required software appliances, and information collection.

CLIENT will also ensure that their staff is available for interviews and that they are aligned with the defined goals of the assessment.



Contact Caddis Digital Solutions to schedule your complimentary tool-based discovery

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