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Guidance for Use of This Document

This document must be used for SO only engagements and must be customised for each engagement and should not be distributed "as is" to a customer. Use this guidance page and the specific instructions throughout this document to determine if it fits your customer's needs. Discard this page prior to presenting to your customer.

Overview:

- a.** This document has been converted to the C&N Standard Style Template. For guidance regarding use of the C&N Standard Style Template and specific style attributes, select C&N > Help.
- b.** Ensure all internal notes and transaction variable text (i.e., red italicised text enclosed within braces { }) have been reviewed for your engagement and customised, as appropriate. Delete all internal notes and the braces surrounding the variable text and change the text style from CN Transaction Variable (i.e., bold, red, italics) to the style used within the applicable section prior to presenting to the customer.
- c.** Use of this document requires the involvement of an IBM Business Development Manager ("BDM") prior to presentation of the contract package to a Customer.
- d.** All existing business processes remain unchanged (WWQA/MD, Quality Assurance, Pricing, etc.). This means all contracts created using this Services Description must be Priced and Quality Assured in accordance with the current guidelines. Although the language contained within each module has been previously reviewed by QA, an overall QA review of the specific terms you select for this transaction must be performed

End of Guidance

**IBM Managed Security Services
Integration Project Management Services**

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Services Description

IBM Managed Security Services Integration Project Management Services

IN ADDITION TO THE TERMS AND CONDITIONS SPECIFIED BELOW, THIS SERVICES DESCRIPTION INCLUDES THE “IBM MANAGED SECURITY SERVICES GENERAL PROVISIONS” (“GENERAL PROVISIONS”) LOCATED AT http://www-935.ibm.com/services/uk/gts/html/contracts_landing.html AND INCORPORATED HEREIN BY REFERENCE.

1. Scope of Services

The Managed Security Services for Integration Project Management Services (called “Integration PM” or “Services”) will provide integration project management services to assist in rapidly deploying new services subscribing to selected IBM Managed Services (called “Agents”) in large and/or complex solutions. Such selected services are identified in the Schedule and referred to herein as the “Selected Services.” The Service assigns an Integration Project Manager to manage a new deployment or a service upgrade project through completion.

2. Facilities and Hours of Coverage

- a. The Services will be performed remotely from IBM location(s).
- b. IBM will provide Services during normal business hours, 8:00 a.m. to 5:00 p.m. Monday through Friday in Customer time zone, except national holidays, unless otherwise specified.

3. Definitions

Integration Manager (IM) – It will be the person assigned to manage the project (usually called “PM – Project Manager”). This person will represent MSS (Managed Security Services) as the main point of contact and interface during the deployment and integration project, mainly responsible to keep project plan, reporting, follow-up as well as the coordination of tasks between all parties and stakeholders involved on the project scope.

Integration and Deployment Engineer (IE/DE) – it will be the person assigned to work on the project as one of the main MSS technical resource mainly responsible to cover deployment and integration tasks as part of the setup and/or configuration to activate services within MSS. This person will be also responsible to coordinate and assist the local team (remotely) during the necessary local tasks and steps to be followed during the project.

SOC – Security Operations Center – it is the security operations department responsible to provide MSS services and support on 24x7 basis (ongoing)

CPE – Customer Premises Equipment.

4. Services

The following table highlights the measurable Services features. The subsequent sections provide narrative descriptions of each Services feature.

Services Feature Summary

Services Feature	Metric or Qty
Project Scope Summary	Provided as part of initiation of services
Project Plan	Provide as part of the Services
Status Reports	1 per week
Status Calls	1 per week

Project Completion Summary	Provided at the completion of the Services
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4.1 IBM MSS Responsibilities

IBM MSS will provide integration project management services which includes a framework for communications, reporting, procedural and contractual activities for the Services.

IBM MSS will:

- a. review the Selected Services, and any associated documents, with a person designated by SO Account (called "Your Point of Contact");
- b. coordinate and manage the technical activities of IBM's personnel;
- c. gain consensus and identify ownership of potential project risks;
- d. establish and maintain communications through Your Point of Contact, as defined in the section entitled "Your Responsibilities" below;
- e. prepare and maintain the project plan which lists the activities, tasks, assignments, milestones and estimates for performance of this Services Description;
- f. measure, track and evaluate progress against the project plan;
- g. help resolve deviations from the project plan with Your Point of Contact;
- h. conduct regularly scheduled meetings with your project team to review project status; and
- i. prepare status reports.

Activity 1 - Initiation (internal IBM)

The purpose of this activity is to initiate the deployment and integration of Agents subscribing to Selected Services.

IBM MSS will:

- a. Attend/participate in engagement/sales hand-off meeting to jointly review
 - (1) Project Scope Summary;
 - (2) Schedule and resources
- b. Review with SO project management team during introductory meetings:
 - (1) Project Scope Summary;
 - (2) deployment process;
 - (3) objectives and current status;
 - (4) deliverables; and
 - (5) Roles and Responsibilities.
- c. provide deployment workshop agenda; and
- d. initiate project.

Completion Criteria:

IBM MSS will have met its responsibility for this activity when IBM MSS has participated in the Introductory meetings, completed Project Scope Summary and initiated the Services.

Deliverable Materials:

- Project Scope Summary; and
- Deployment workshop agenda.

Activity 2 - Planning

The purpose of this activity is to engage IBM MSS team with the end customer and conduct a one day deployment workshop to complete and finalise planning activities.

IBM MSS will:

- a. provide a description of recommended attendees for the deployment workshop;
- b. attend a one day deployment workshop, conducted by IBM, onsite at a location provided by SO Account for up to 20 attendees, which may consist of:
 - (1) MSS overview;
 - (2) Discovery - technical deep dive;
 - (3) solution scope and planning; and
 - (4) Project schedule / timeline.
- c. provide an alternate means of conducting the deployment workshop if a session onsite at a location provided by you cannot be facilitated;
- d. coordinate performance of data discovery related to selected services;
- e. coordinate performance of architecture and placement planning and review;
- f. Perform discovery on customer change control and Agent installation processes; and
- g. Establish/document operational contacts.

Completion Criteria:

IBM MSS will have met its responsibilities for this activity when the deployment workshop has been conducted and planning activities have been completed.

Deliverable Materials:

- Project team contact list;
- Establish and initiate status call format and schedule;
- Establish project plan;
- Discovery and solution design (as applicable);
- Change and installation process; and
- Operational contact list.

Activity 3 - Staging

The purpose of this activity is to coordinate staging of Agent(s) in preparation for implementation.

IBM MSS will:

- a. coordinate preparation of Agent configuration and hardening;
- b. coordinate preparation of out-of-band (“OOB”) configuration (as applicable);
- c. coordinate Portal account configuration; and
- d. coordinate preparation of the IBM MSS infrastructure configuration.

Completion Criteria:

IBM MSS will have met its responsibilities for this activity when staging activities are complete and Agents are ready for implementation and integration.

Deliverable Materials:

- Prep for Agent configuration;
- Prep for OOB; and
- Portal account configuration.

Activity 4 - Integration

The purpose of this activity is to coordinate the integration of Agents and testing and verification

IBM MSS will:

- a. schedule service installation dates;
- b. coordinate with IBM MSS technical resources to provide CPE installation phone support for onsite installer;
- c. coordinate with IBM MSS technical resources and your Point of Contact to perform Agent and service testing and verification;

- d. coordinate with IBM MSS technical resources and Your Point of Contact to provide Portal and service training; and
- e. coordinate with IBM MSS technical resources and Your Point of Contact to schedule welcome call.

Completion Criteria:

IBM MSS will have met its responsibilities for this activity when Agents have been successfully deployed and tested.

Deliverable Materials:

- SOC Contact Information

Activity 5 - Closeout

The purpose of this activity is to closeout the Services.

IBM MSS will:

- a. review remaining open action items (as applicable);
- b. participate in a project review;
- c. create a Project Completion Summary; and
- d. hand off open action items to the IBM MSS Steady State team (if applicable).

Completion Criteria:

IBM MSS will have met its responsibilities for this activity when selected services have been activated in steady state delivery.

Deliverable Materials:

- Project Completion Summary; and
- Steady state selected services.

4.2 Your Responsibilities

The SO Account team will designate a person as "Your Point of Contact", to whom all communications relative to the Services will be addressed and who will have the authority to act on the your behalf in all matters regarding the Services. The designated Point of Contact can include: Transition or Transformation Project Manager, and ISA, Service Delivery Manager (SDM), DPE, PE, etc.

You or Your Point of Contact agree to:

- a. work with IBM to review the Services, and any associated documents;
- b. work in good faith with IBM to complete the project within the project schedule;
- c. align your resources, coordinate and manage required technical activities of your personnel;
- d. participate in status meetings;
- e. maintain communication with IBM MSS;
- f. be responsible for providing IBM MSS with all data required to configure and manage the selected services;
- g. complete and return any IBM MSS provided questionnaires or checklists in accordance with the dates provided in the project plan (as applicable);
- h. be responsible for coordinating and/or performing all physical installation tasks;
- i. initiate and maintain proper infrastructure to allow IBM MSS access into your environment for delivery of the Select Services;
- j. serve as the interface between SO Transition PM's and all of your departments participating in the activation of selected services;
- k. help resolve issues, and escalate issues within your organisation, the customers organisation, or any third party team's organisation as necessary;
- l. administer proper project change controls with IBM MSS, in order to maintain project schedule;
- m. mutually agree to all scheduled activities within project plan, including dates, times and resources;
- n. insure proper escalation contacts are identified within escalation matrix; and

- o. In general, obtain and provide applicable information, data, consents, decisions and approvals as required by IBM MSS to perform the activation of selected services in accordance with the dates provided in the project plan.

Activity 1 - Initiation (internal IBM)

The purpose of this activity is to initiate the deployment and integration of Agents subscribing to Selected Services.

SO Account Team Designee will:

- a. Attend/participate in engagement/sales hand-off meeting to jointly review:
 - (1) Project Scope Summary; and
 - (2) Schedule and resources.
- b. Review with SO project management team during introductory meetings:
 - (3) Project Scope Summary;
 - (4) deployment process;
 - (5) objectives and current status;
 - (6) deliverables; and
 - (7) Roles and Responsibilities.

Activity 2 - Planning

The purpose of this activity is to engage IBM MSS team with the end customer and conduct a one day deployment workshop to complete and finalise planning activities.

SO Account Team Designee will:

- a. provide IBM MSS with a list of recommended attendees for the deployment workshop;
- b. attend a one day deployment workshop, conducted by IBM MSS, onsite at a location provided by SO Account team for up to 20 attendees, which may consist of:
 - (1) MSS overview;
 - (2) Discovery - technical deep dive;
 - (3) solution scope and planning; and
 - (4) Project schedule / timeline.
- c. provide an alternate means of conducting the deployment workshop if a session onsite at a location provided by SO Account team cannot be facilitated;
- d. assist coordinated performance of data discovery related to selected services;
- e. assist coordinated performance of architecture and placement planning and review;
- f. assist discovery on customer change control and Agent installation processes; and
- g. assist Establish/document operational contacts.

Activity 3 - Staging

The purpose of this activity is to coordinate staging of Agent(s) in preparation for implementation.

SO Account Team Designee will:

- a. assist coordinated preparation of Agent configuration and hardening;
- b. assist coordinated preparation of out-of-band ("OOB") configuration (as applicable);
- c. assist coordinated Portal account configuration; and
- d. assist coordinated preparation of the IBM MSS infrastructure configuration.

Activity 4 - Integration

The purpose of this activity is to coordinate the integration of Agents and testing and verification

SO Account Team Designee will:

- a. assist schedule service installation dates.

- b. assist with coordination of IBM MSS technical resources to provide CPE installation phone support for onsite installer;
- c. assist with coordination of IBM MSS technical resources and your Point of Contact to perform Agent and service testing and verification;
- d. assist with coordination of IBM MSS technical resources and Your Point of Contact to provide Portal and service training; and
- e. assist with coordination of IBM MSS technical resources and Your Point of Contact to schedule welcome call.

Activity 5 - Closeout

The purpose of this activity is to closeout the Services.

SO Account Team Designee will:

- a. review remaining open action items (as applicable);
- b. participate in a project review;
- c. assist/review Project Completion Summary; and
- d. review hand off of open action items to the IBM MSS Steady State team (if applicable).