The Maxsum Proven Process - Client Engagement Framework

The Maxsum Proven Process is comprised of a series of steps to facilitate proactive engagement with your organisation to create a cycle of continuous improvement.

Engagement	Agenda & Aims	Outcomes	Attendees	Frequency
REVIEW & RECOMMEND *Business Technology Review* *Business Technology Audit*	• Strategic review including a site visit and technical investigation process aligned as well as a discover of your business technology priorities and aims.	• A clearly documented **Business Technology Review or Business Technology Audit** report with recommendations that will inform • The best-fit Managed IT Support and Managed Security Service levels with Maxsum Consulting • Priority project works and Quarterly Business Technology Review agenda items	Conducted in person at your office or the Maxsum office (or remotely if required) • Maxsum Business Development Lead • Maxsum IT Strategy Consultant • Your IT Lead	***Once***, at the commencement of discussions around entering into a Managed IT Services Agreement with Maxsum Consulting
SELECT *Managed IT Support Level* *Managed Security Service Level*	• Presentation and review of the outcomes of the REVIEW & RECOMMEND phase • Selection of the best-fit Managed IT Supports and Managed Security Service levels with Maxsum Consulting • In detail review of the full Managed IT Services Agreement based on the selected levels.	• Clear understanding of Managed Services Agreement inclusions, exclusions and service level agreements • Clear understanding of the Managed Services Agreement Terms & Conditions • Clear understanding of Managed Services Agreement Key Definitions	Conducted in person at your office or the Maxsum office (or remotely if required) • Maxsum Business Development Lead • Maxsum IT Strategy Consultant • Your IT Lead	***Once***, prior to entering into a Managed IT Services Agreement with Maxsum. Again at any time of change to the Managed IT Services agreement with Maxsum
ONBOARD *Onboarding Project Kick-Off*	• Briefing to provide your IT lead with an overview of Managed IT Services onboarding activities and timeline • Introduction to onboarding project lead at Maxsum	• Clear understanding of service transition and onboarding activities and timeline • Clear understanding of key milestones in the service transition & onboarding process • Clear understanding of key information collection and/or transfer points • Clear understanding of business continuity needs and plans during service transition & onboarding	• Maxsum Onboarding Project Lead • Your IT Lead	***Once***, prior to the commencement of Service Transition & Onboarding.
Site Visit	• Additional site visit and/or technical investigation, if required, to build a complete understanding of current site configuration and requirements	• Clear understanding and documentation of your site and technical environment • Clear understanding of service transition provisions and requirements from previous/other providers	• Maxsum Onboarding Project Lead and/or designated Maxsum engineer • Your IT Lead	***Once***, at the commencement of the Service Transition & Onboarding Project
IT Support Portal Set-up	• Meeting with onboarding project lead to finalise the IT Support Portal implementation across your organisation	• Clear understanding of how the IT Support Portal will be deployed and operate • Clear understanding of support request types • Finalisation of any request form customisation required • Provision of supporting documentation/training materials	• Maxsum Onboarding Project Lead • Your IT Lead	***Once***, during the Service Transition & Onboarding Project
Communications & Engagement	• 5-Day Email Onboarding Program for all staff	• All staff will receive an email each morning for 5 days from Maxsum providing training on how to log tickets with Maxsum and use the Maxsum Support Portal	Conducted remotely, via email. • Emails will be sent to all staff.	***Once***, at the conclusion of the Service Transition & Onboarding Project Again, as required or after 24 months.

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	• Company Profile Session with Maxsum	• Key representatives from your organisation engage in a live Q&A about your organisation and/or • The Maxsum Onboarding Project lead will host an internal toolbox for the Maxsum Service Delivery team to facilitate knowledge sharing and Q&A	Conducted in person at the Maxsum office (or remotely if required) • Your IT Lead • Other representatives you select to attend • Maxsum Managing Director & Service Delivery Team	**Once**, at the conclusion of the Service Transition & Onboarding Project Again, as required or after 24 months.
MANAGED IT SERVICES *Day-to-day IT monitoring & support*	• Official commencement of support services *We collect & action your feedback here for each and every Service Request!*	• Your staff can call, email or use the Support Portal to log Service Requests at any time. • Automated monitoring and alerts will be running 24x7 • Regular knowledge, support and training opportunities are provided to your team	All client staff Maxsum Service Delivery Team	**24x7**
CONTINUOUS IMPROVEMENT *Account Management Meetings*	• Review your business technology request and requirements at an **operational** level • Review **Client Environment Housekeeping Report** • Review current project status • Address any procurement or business technology hardware/software/service purchasing or replacement needs • Opportunity to provide Service and/or Account Management Feedback *We collect & action your feedback here!*	• Copy of the **Client Environment Housekeeping Report** for the previous month • Clear understanding of status of hardware and software assets • Clear understanding of tickets raised and resolution status • Clear understanding of patching and alerts resolved • Review of Service Level Agreement metrics • Follow-up quotes or hardware/software/service additions or upgrades required • Confidence that your ongoing business-as-usual business technology needs and requirements are being proactively met and catered for.	Conducted in person at your office or the Maxsum office (or remotely if required) • Maxsum Account Manager • Your IT Lead	**Monthly**, in person Anytime by phone or email in between monthly AM meetings for requests relating to: • Hardware, software or service needs • Service request or ticket follow-ups • Updates or need to know communications between your team and ours • Billing or account enquiries • Suggestions or complaint resolution
Quarterly Strategic Review Meetings	• Elevate business technology conversations to a **strategic** level • Prioritise, roadmap and track key strategic IT projects and initiatives *We collect & action your feedback here for each and every Project!* *We collect & action your feedback here!*	• Your business technology projects and initiatives clearly documented and timelined on your **Business Technology Plan On A Page**	Conducted in person at your office or the Maxsum office (or remotely if required) • Maxsum Strategic IT Consultant • Your IT Lead • Your Corporate Services or Executive Management Team representatives overseeing IT	**Quarterly**, in person Anytime by phone or email in between quarterly meetings for requests relating to: • Your *Plan on a Page* • Follow up on projects or initiatives documented on your *Plan on a Page* • New initiatives or projects • Regulatory or compliance questions or concerns
Annual Planning Session	• Discuss role of IT in overall organisational strategy • Review the previous year's engagement • Discuss current business technology pain points, roadblocks and opportunities • Work to provide innovative solutions to pain points and roadblocks • Discuss new technologies and future enablers • Discuss emerging priorities *We collect & action your feedback here!*	• Maximise value business technology solutions and support are providing your organisation • Proactively track business technology project initiatives and successes • Increase understanding of potential impacts of new technologies or solutions • Understand and work alongside your business priorities • Confidence that you are leveraging business technology to produce productivity and efficiency gains across your organisation in a cost-effective and future-focused way	Conducted in person at your office or the Maxsum office (or remotely if required) • Maxsum Strategic IT Consultant • Your CEO/GM • Your IT Lead • Your Corporate Services or Executive Management Team representatives overseeing IT	**Annually**, in person Anytime by appointment if required throughout the year for requests relating to: • Initiating larger scale Business Technology Reviews or Strategic Planning • Major organisational change or restructure • Major regulatory or compliance requirement changes

Enabling Opportunity, Realising Potential
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