Logicalis Transition Methodology Phases

While every project is inherently unique, a consistent and structured approach to delivery is essential for ensuring a well-orchestrated Transition and achieving successful outcomes.

The Logicalis Transition Methodology reflects decades of industry expertise, lessons learned in the field, and a steadfast commitment to continuous service improvement.

Transitions are expected to be completed in 60 calendar days unless stated otherwise in the SOW.

Initiation

Plan

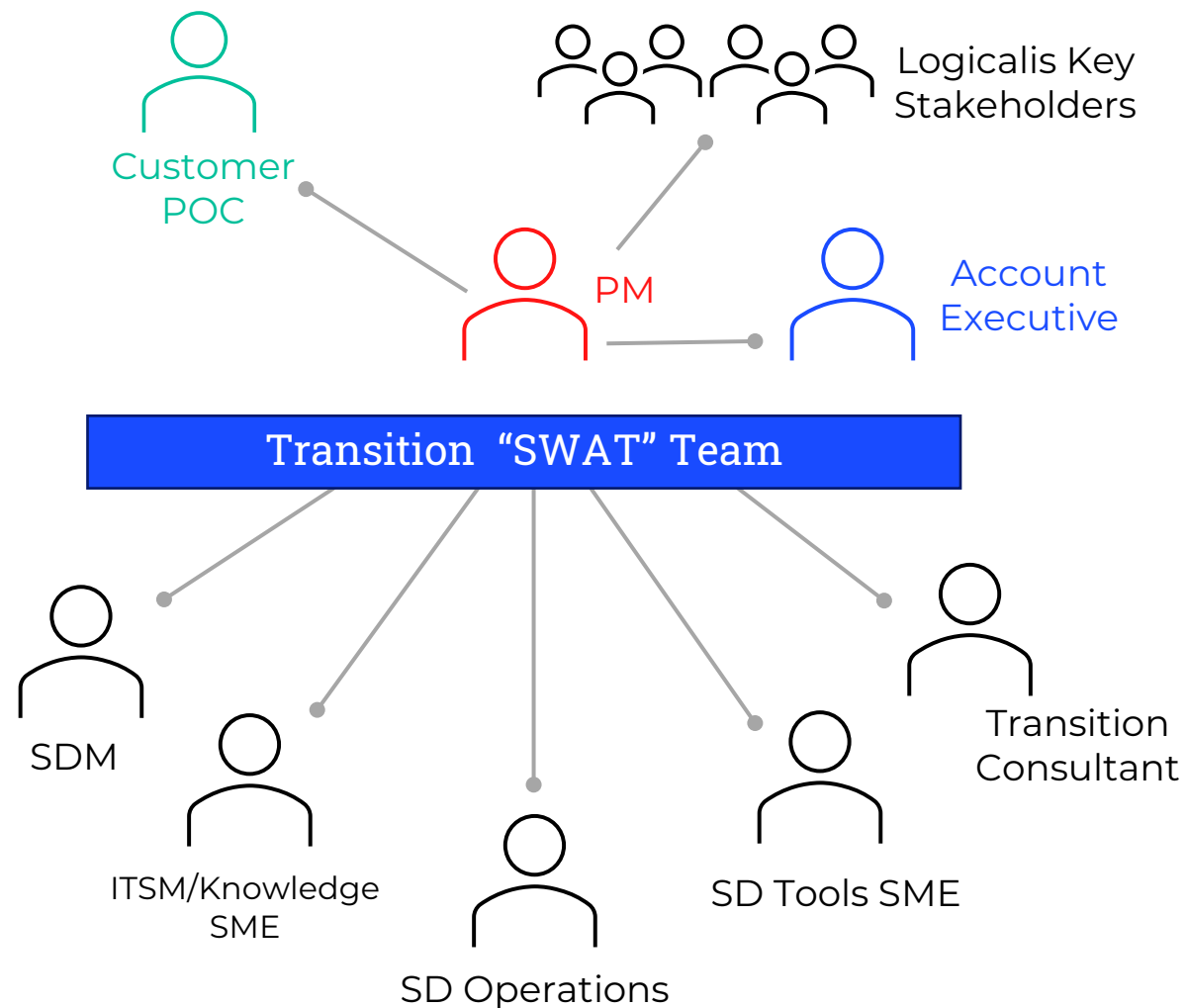Onboard

Test & Validate

Cutover & Hypercare

Transition Close

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Transition Project Governance

The Logicalis Project Manager will be at the center of the Governance Model and accountable to the Customer Point of Contact and Logicalis Key Stakeholder(s).

The Transition Team Subject Matter Experts (SMEs) responsible for the execution of the delivery of the onboarding requirements and assigned tasks for their respective areas of expertise.

Customer POC

Logicalis Key Stakeholders

PM

Account Executive

Transition "SWAT" Team

SDM

ITSM/Knowledge SME

SD Operations

SD Tools SME

Transition Consultant

Customer Role in Transition

Our most successful and timely Transitions are those in which the Customer has been highly collaborative and engaged at the necessary points in the project. Logicalis will provide the guidance and do the heavy lifting but there are some dependencies on the Customer to provide the necessary information, access, and actions to fuel the project engine for success.

Here are few ways our Customers can facilitate a timely Transition:

- ✓ Designate a Customer Project Manager or primary Point of Contact (POC) to act as the counterpart to the Logicalis PM

- ✓ Make available Customer Subject Matter Experts (SMEs) for knowledge transfer, planning, workshops, and any assigned Customer tasks in support of the Transition

- ✓ Prioritize Logicalis access, credentials, and implementation of the selected mode of Customer/Logicalis interface required to deliver our services

- ✓ If not already current, start reconciling your Knowledge Base with relevant articles

- ✓ Be prepared to share and contribute to Knowledge Base development and training on any custom business applications that are in scope for support

- ✓ Engagement in status meetings, risk management, and any issue management support.

Establishing Connectivity & Access

Establishing Connectivity

Considerations:

How will Logicalis connect to the customer systems under support?

Standard Options:

- Site-to-Site VPN

- Cloud-based connectivity (Azure, AWS, others)

- Customer based Citrix connectivity

NOTE: Client based VPN (i.e. AnyConnect) is not an option as it breaks connectivity to the Logicalis systems including IP Telephony and Knowledge Bases

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Transition Planning
Workshop

Transition Planning Workshop

Purpose: *Conduct a series of focused conversations to gain a deep understanding of the customer's environment, current support operations, and the technical requirements to stand up the service in accordance with the new scope and expected level of support.*

Joint Activities:

- Determine workshop attendees and schedule workshop

- Current State Discovery
  - Review current Service Desk org and workflow
  - Overview of the ticketing tool *(as needed)*
  - Review Key Metrics
  - Review current Knowledge Base content
  - Other discovery as needed

- Review Discovery Questionnaire responses
  - Summarize Findings for gap analysis actions and Project Plan development

Output:

- Transition Project Plan Review and Acceptance

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STEP 3:

Support Tools Configuration

ITSM Setup and Configuration

OPTION 1: Using Logicalis ITSM System

- Requirements information gathered during the Planning & Discovery Workshop
- Apply customer specific configuration requirements *(Logicalis task)*
- Test and validate *(shared Logicalis and Customer task)*
- Customer Training Session for the LogicalisNow Service Portal *(Logicalis task)*

OPTION 2: Using Customer ITSM System

- Apply defined SOW reporting requirements *(customer owned task)*
- Access & testing of the Customer Ticketing System *(shared task)*
- Training Session for the Customer Ticketing System *(customer owned task)*
- Final test and validation of Logicalis readiness *(shared Logicalis and Customer task)*

Will E-Bonding be required for this opportunity?

Telephony & Service Support Intake Configuration

Activities & Responsibilities	Customer	Logicalis
• **Designate an exchange number:** *(Area Code 513) tbd & unique to the customer*	X	X

• **Determine Telephony Routing:**
  • *Setup a callout from the customer IVR system to the Logicalis number*
  • *Call the Logicalis number directly*
	X	X

• **Determine Announcement:**
  • *Customer defined greeting scripting and recording*
  • *Define and configure any routing requirements*
	X	X

• **Email address from Finesse / Social Miner for the inbound tickets (if desired):** • customer_name@us.logicalis.com		X
• **Chat setup**		X

KNOWLEDGE BASE DEVELOPMENT

****A robust Knowledge Base is the cornerstone of a highly effective Service Desk.
Customer input is essential to its development.****

Activities & Responsibilities	Customer	Logicalis
Evaluate Customer's existing Knowledge base	X	X
Update/Rationalize usable content	X	X
Add new knowledge articles (*if applicable*)		X
Define Knowledge Base Governance & Maintenance protocols	X	X

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Support Process Documentation & Training

SERVICE DESK SUPPORT PROCESS DOCUMENTATION READINESS

Examples:

- Password Reset / Account Unlocks

- Microsoft Authenticator

- Caller Verification

- Major Outage Determination

- Non-standard/Proprietary applications and/or processes

- Major Incident/Emergency escalation contacts and protocols

- Other as needed and will be discussed during planning workshop(s)

Logicalis Service Desk Analyst Enablement

Training Development: *Two weeks prior to Go Live*

- Customer specific support process training
- Any custom business application support training *(Developed in conjunction with the customer)*
- Knowledge Base Content

Training Conducted: *One week prior to Go Live*

- Multiple shifts involved
- Test each agent's remote connectivity access

Customer Enablement
"How To" Information

Logicalis "Customer Welcome Pack"

- ✓ Engaging Service Desk Support
- ✓ Escalation & contact Information
- ✓ Outages reporting
- ✓ Dedicated Phone number
- ✓ Emergencies reporting
- ✓ Other relevant information as needed

Welcome Pack and training provided by your Logicalis Service Delivery Manager

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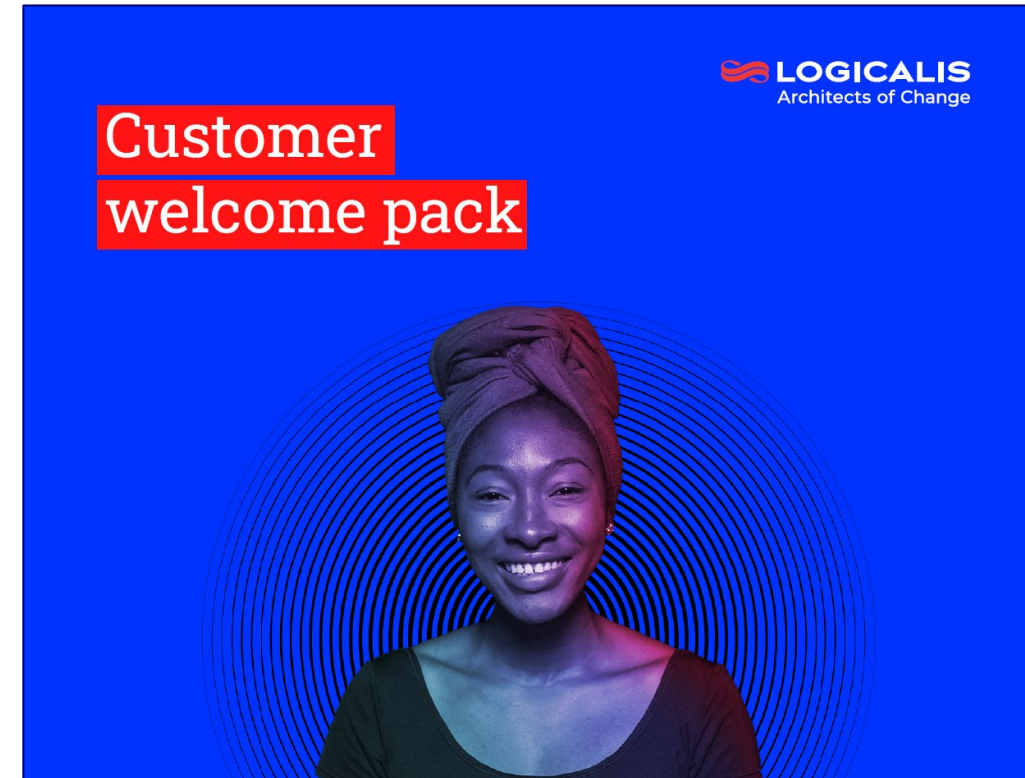
Pre and Post Go Live Activities

Readiness Testing & "Go/No Go Review"

- ✓ Test intake number, greeting, and routing (as applicable)

- ✓ Test all Agent access

- ✓ Sample Incident and Request workflow and tools configuration test and validation *(Logicalis and Customer joint exercise)*

- ✓ Logicalis and Customer approval required before going live

Go Live & "Hypercare"

- Ten-day post Go Live high-touch joint support from Logicalis Transition Team, Logicalis Service Desk Operations Team and Customer Team (Hypercare)

- Designed to support any early issues and identification of improvement opportunities to quickly move to steady state operations

- Feedback from customer community and reporting metrics monitoring to enhance end user experience and measure performance

- Transition Closeout review meeting with customer before full handover to Service Desk Operations and the Logicalis Service Delivery Manager

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Thank you

Addendum

Logicalis Service Desk VPN

The following are the IPSec IKE configuration parameters for your Service Desk VPN connection to Logicalis.

Customer: _____

Customer Gateway (Firewall) IP: Provided by Customer
Encryption Source (SA):10.182.x.0/24 (provided by Logicalis)

Or Public IP(s) Provided by Customer

***Note:* Customer is responsible to provide static NAT from 10.182.x.0/24 range to customer Terminal Servers**

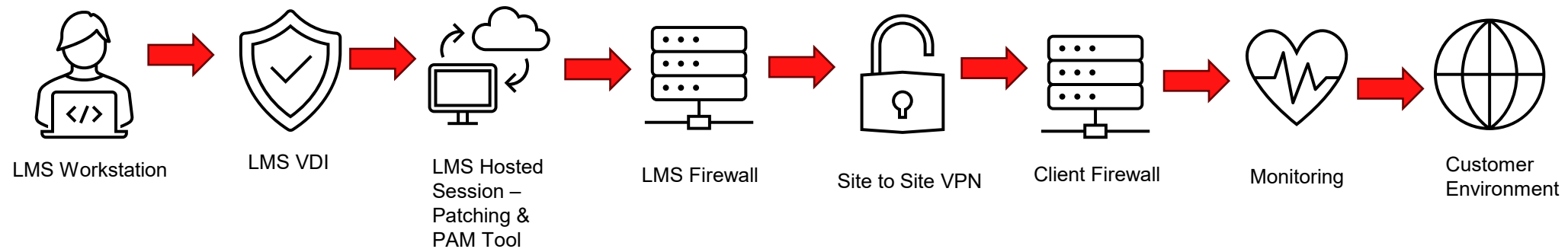Customer Terminal Server IP(s)/NAT IP(s):
Provided by Customer
Ex: 10.10.10.1   NAT 10.182.x.1
       192.168.7.5 NAT 10.182.x.5

Logicalis:
Logicalis Gateway IP: 173.195.83.66
Encryption Source (SA): 173.195.83.69/32

	Logicalis	Customer Name
Customer Name	**Logicalis Service Desk**	
Customer Location		
Site ID	ASAv	
VPN Endpoint IP	**173.195.83.66**	
	Phase 1 (IKEv1)	
Encryption	AES256	
Hash	SHA1	
DH Group	2	
Lifetime	28800	
Pre-Shared Key	Exchanged on phone, TBD	
	Phase 2(IKEv1)	
Encryption	AES256	
Hash	SHA1	
PFS	**Group 2**	
Lifetime	3600	
Encrypted Networks	173.195.83.69/32	**10.182.x.0/24** or **10.182.x.1/32** Here "x" value will be given by Logicalis Engineer to Customer. **Note: If this range (10.182.x.0/24) is not available, then Customer need to provide a Public natted ip for their Terminal server.**

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Secure access is a priority we all share. Logicalis' approach to secure access is multi-faceted and robust

LMS Workstation → LMS VDI → LMS Hosted Session – Patching & PAM Tool → LMS Firewall → Site to Site VPN → Client Firewall → Monitoring → Customer Environment

Logicalis Managed Services uses dedicated Virtual Desktop Infrastructure to connect to supported devices.

LMS VDI:

- Industry Security Standards – Scanned, Audited, and Maintained
- Individual Identity Source – Access Approved, Audited, and Automated
- Multi-Factor Authentication – Enforced and Automated Configuration
- Monitored – Security Information and Event Management (SIEM)
- Video Session Recording – All activity
- Device Credentials – Role-Based Access, Logged, and Audited
- Network Segmentation

Other Considerations:

- LMS users can't access the PAM without a license to the VDI instance, as well as a license to the PAM tool.
- Patching Service Account should have interactive login disabled so you are not able to RDP into a machine with those credentials. One can only start, stop or remote install software.