



Overview of Workshop Offering: SOW/SLA Review Workshop

Outsourcing Support Services (OSS)

SOW/SLA Review Workshop | Overview



Purpose: Define key components of SOWs and SLAs and review client SOWs highlighting strengths and areas for improvement

Agenda

- Introductions and background
- Review and refine SOWs and SLAs
- Identify open issues and action items

5-6 hours of joint problem-solving and planning

Additional details and timing on following page

Objectives

- Define best practice SOW and SLA
- Agree to SLA methodology
- Revise draft of client SOW and SLA
- Assign action items with timeframes

Typical participants

- Core team leader
- Project manager
- Sourcing lead
- Legal (optional)
- HR (optional)
- Other members of core project team
- Subject matter experts

Everest inputs

- Experience based market insight
- Sample best practice SOWs and SLAs
- Direct feedback on client's existing SDs and SLAs
- Facilitate workshop

Client preparation

- Bring client specific service descriptions and service levels for review
- Current service metric with data
- Unique requirements

Agenda item	Time allocation
Introductions and background <ul style="list-style-type: none">■ Objectives of initiative■ Scope of initiative■ Structure for how SOW/SLA incorporated into overall agreement■ Best practices for SOW/SLA development (if appropriate)■ SLA methodology	1-2 hours
Review and refine SOWs and SLAs <ul style="list-style-type: none">■ Walkthrough SOWs and SLAs line-by-line■ Refine in real-time■ Highlight items to be further evaluated/completed (e.g., missing scope, input from end-users on trade-offs, key options to test with suppliers)	4 hours
Identify open issues and action items <ul style="list-style-type: none">■ Assign action items■ Determine target dates	0.5 hour

Client

- Draft SOW and SLA
- Vet the SOW and SLA with key stakeholders and subject matter experts
- Bring following items to the workshop
 - Draft SOWs and SLAs (provide to Everest 2 days in advance of workshop)
 - Examples of any current SLAs with supporting data
 - Unique requirements in the environment that may impact the SOW and/or SLA
- Complete draft project responsibility matrix
- Invite appropriate meeting participants
- Secure logistics for meeting (room, audio-visual, etc.)

Everest

- Provide and discuss in advance of workshop
 - Structure for how SOW/SLA incorporated into overall agreement
 - Best practices for SOW/SLA development
 - SLA methodology
 - Draft project responsibility matrix
- Confirm logistics of workshop
- Bring following items to the workshop
 - Structure for how SOW/SLA incorporated into overall agreement
 - Best practices for SOW/SLA development
 - SLA methodology
 - Comments on draft SOW and SLA

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