



CLOUD COST OPTIMIZATION - SERVICE DESCRIPTION

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1 OVERVIEW

The InterVision Cloud Cost Optimization Service outlined in this proposal will identify opportunities for both short-term and ongoing cost savings. InterVision utilizes a pre-planned review, project plan, experienced cloud engineers and expert cloud cost savings personnel. We will also deploy an InterVision-developed analytic tool and dashboard to identify savings, execute quick-win changes and provide ongoing insight into cost savings, trends and spend.

The Cloud Cost Optimization Service is one of the best practice-based services InterVision provides. It incorporates the Cost Optimization pillar of the AWS Well Architected Framework to perform a deep analysis of your AWS costs and usage. InterVision can also perform Well Architected Reviews that evaluate performance efficiency, security, reliability, and operational excellence, but this engagement focuses on cost optimization.

Findings uncovered during this engagement will be categorized as quick-wins or future state changes. Quick-wins are low or no risk changes that immediately reduce or manage your AWS costs without significant impact to your environment. InterVision can execute these changes or collaborate with your technical team to guide them in execution. More significant changes that require architectural review or operational planning will be categorized as future state changes. These outline major improvements to your AWS architecture, where execution would require a follow-on work order.

For many InterVision clients, we identify 30% or more cost savings. A significant number of clients achieve much greater savings. As part of this service, we will provide the following:

Infrastructure	Identify and remove unused or unnecessary resources for immediate cost savings
Compute	Review compute resources and pricing models to identify potential cost optimizations
Storage	Pinpoint opportunities to minimize AWS storage costs while ensuring availability
Data Transfer	Uncover opportunities to reduce data transfer costs based on client use cases
Governance	Review cost governance controls and implement budget notifications, cost attribution tagging, and utilization alarms specific to your workloads
Financial Operations	Identify applicable savings plans and credit programs, and leverage reserved instances to maximize AWS investments

Cost Optimization Dashboard

As part of this engagement, InterVision will set up and provide the customizable InterVision Cloud Cost Optimization dashboard which provides insights at both a business-unit level and technical service level. The dashboard provides simple access to historical, current, and forecasted spend & savings data. It provides the following:

- Monthly & Daily Spend Overview



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- Reserved Instance Cost Savings Summary
- Spend Commitments
- Reserved Instance Coverage
- Technical Insights
- Billing Summary
- Forecast of future spend

This InterVision Cloud Cost Optimization Dashboard provides insight about your data and makes it easier to spot trends. This enables better resource and spend management beyond the initial cost savings activities. This Dashboard is available for all Cost Optimization clients. Clients who transfer AWS Accounts to InterVision will retain this dashboard throughout the relationship. Clients engaging only in Cost Optimization receive access to the dashboard for a period of 6-months.

The Cost Optimization Process

The InterVision cost optimization process takes a deep dive into your environment with highly experienced Cloud Architects and Cloud Operations experts to identify savings that no tool alone can uncover. Typical engagements complete in to 4-6 weeks. The process consists of the following steps:

- Project Initiation – Kick Off, Project Discovery, AWS Access
- Financial Management – Implement Tagging, Build Cost Optimization Dashboard
- Architectural Review – Cost Governance Review; Identify Underutilized and Idle Resources; Review Right-Sizing, Storage Tiering, Data Transfer and Future State Recommendations
- Recommendations – Report Findings, including quick-wins and future state changes
- Cost Saving execution – Implement quick-win changes (As approved by client)

Service Delivery Team

InterVision will provide a service delivery team that consists of the following Cloud experts:

InterVision CloudOps Specialist – This person is a Cost Optimization Expert and Project Manager. They will contribute as the overall project manager, coordinator and primary client interface. This person works directly with the InterVision services team and InterVision cloud architect to execute this service.

Cloud Architect – The Cloud Architect focuses on cost optimization activities like analysis, recommendations and execution. This individual will have the deep expertise in AWS cloud architecture and implementations to find cost savings, assess the impact and risks of possible modifications, and then execute changes.

Cost Savings Guarantee

InterVision's objective is to identify cost savings of 30% or more. We are confident in our ability to find these savings so we offer a Cost Savings Guarantee in which you will receive credits against this service cost if we fall short of achieving this goal. This cost saving guarantee is offered to ensure our clients achieve quick ROI, even in cases where a full 30% savings is not possible. Details of this guarantee are provided in section 7.2 "Cost Savings Guarantee".

2 PROJECT SCOPE

InterVision resources will deliver the following services to support Customer's program initiative as described and agreed.

2.1 PROJECT INITIATION, DISCOVERY AND KICK OFF

The project discovery and kick off phase will initiate the project. This phase is designed to make introductions, collect and transfer information, align expectations and establish a working cadence. This phase will include the following:



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- Conduct a kick-off meeting to introduce the team, confirm project goals, confirm project participants, and timeline
- Present Project Plan
- Understand any business and technical objectives, constraints or issues related to executing the project
- Agree upon overall communication plan to include status updates
- Confirm Customer tasks and requirements:
 - Gather existing documentation relevant to the engagement – AWS bills, AWS contracts
 - Validate client will provide AWS access to InterVision
- Conduct project discovery and information gathering necessary to execute project

2.2 FINANCIAL MANAGEMENT PHASE

The financial management phase will organize and evaluate the current spend patterns, purchase plans, and credits to identify opportunities that reduce purchasing costs. This phase also establishes a dashboard which improves your view and provides analytics into your AWS spend, commitments, reserved instance coverage, savings, forecasts, and billing summary. This phase will include the following:

- Review existing reports
- Identify credits
- Develop tagging strategies
- Create the InterVision Cost Optimization Dashboard
- Identify hedging options

This phase requires InterVision to have appropriate AWS access.

2.3 ARCHITECTURAL REVIEW PHASE

The architectural review phase will look at overall governance and efficiency of resource usage to identify utilization, design, and policy improvements that will have both immediate and long-lasting cost savings impacts. Each of the reviews and analyses will be performed to identify optimization opportunities and assess their financial and operational impact. All optimizations will be reviewed in the context of overall impact to operations and the risks associated with changes.

- Review cost governance – account structure, cost notifications and controls, enforcement and tagging policies
- Identify unused or unnecessary resources – inclusive of EC2, EBS, Elastic IPs, ELB, Snapshots, NAT and Internet Gateways
- Review storage lifecycle policies and tiering
- Review sizing of compute and database instances
- Review data transfer – inclusive of VPC routing and peering, Transit Gateway, CloudFront, Direct Connect, VPC endpoints and other high traffic services
- Identify opportunities requiring architectural changes or operational planning. These may include adoption of new services, throttling (API Gateway), and utilization of buffer-based services, demand-based services, and time-based services. Recommendation may include re-platforming, re-factoring, re-architecting opportunities, and their risks.

2.4 RECOMMENDATIONS

InterVision will consolidate all findings, opportunities and recommendations into a Cost Optimization Summary Report and present this report to the Client in a secure video/web conference. InterVision will identify all actionable items that are in scope for execution within the terms of this service as well as additional cost savings



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and optimization beyond the scope of this service. The following items will be executed in the Recommendation phase:

- Present savings recommendations and options
- Present findings versus best practices report
- Present future state recommendations
- Present ROI analysis of future state recommendations
- Provide Cost Optimization Summary Report
- Provide AWS purchasing agreement (APA) for execution of recommendations
- Gain agreement with client on cost saving initiatives to be executed upon

2.5 COST SAVINGS EXECUTION PHASE

This phase will execute the agreed cost savings initiatives and includes applicable AWS program credits, purchasing plans, and AWS configuration changes.

- Apply credits
- Setup invoicing
- Implement quick-win technical changes
- Validate performance post-technical changes
- Purchase and implement RI's and/or Savings Plan

This phase requires InterVision to have appropriate AWS access.

Future state changes, as noted in the recommendation report, will require an additional work order or hourly charges.

2.6 SERVICE DELIVERABLES

The following deliverables will be created and provided to Customer as part of the project scope:

- Cost Optimization Dashboard – online portal
- Cost Optimization Summary Report
- AWS Purchase Agreement (APA)

3 ASSUMPTIONS & RESPONSIBILITIES

3.1 GENERAL ASSUMPTIONS & RESPONSIBILITIES

- Customer will provide copies of AWS bills, AWS contracts, appropriate AWS access, and other materials deemed necessary by InterVision to complete the tasks in scope. The Customer will be responsible for any delays or scope/pricing changes required due to access capabilities deemed insufficient by InterVision.
- At the completion of this project, Customer shall be responsible for any on-going support and/or enhancements. Customer may engage InterVision for ongoing support in an additional Work Order.
- InterVision may replace or reallocate resources during the project with notification to Customer. InterVision does not guarantee specific designated individuals or personnel assigned to a project, and may at its discretion assign, delegate, or subcontract any or all obligations contained within this Work Order to a third party.

3.2 PROJECT SPECIFIC ASSUMPTIONS

- Customer will make available members of their staff as required to deliver upon the project scope. This will include: a decision maker, subject matter expert(s), Customer leadership and management as appropriate.



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- Customer teams and stakeholders will be available for exercises, meetings, data collection and transfer activities as required to fulfill the project scope.
- If the Customer is not available or cannot attend, the timeline may be delayed.
- The scope of this project is as outlined in this Work Order and created project plans only.
- Customer’s project sponsor will participate and act as a final authority for establishing relevant decisions and consensus.
- The Customer is responsible for ensuring practices and systems impacted by or as a result of the project scope are functioning properly before and after the engagement.
- AWS read-level access is required to conduct initial reviews, and elevated permissions will be required to implement any approved changes.

3.3 PROJECT ROLES AND RESPONSIBILITY MATRIX

The matrix below identifies who is responsible for key elements for the execution of the cost optimization service. “X” indicates the responsible party.

Task	InterVision Cloud Ops Specialist	InterVision Cloud Architect	Customer
Project Management and Coordination	X		
Provide Bills, Contracts and AWS Access			X
Review Financial Reporting	X		
Execute Tagging		X	
Creation of AWS Spend and Cost Optimization Dashboard	X		
Cost Governance Review		X	
Identify Unnecessary Resources		X	
Identify Idle Resources		X	
Identify Right-Sizing Recommendations		X	
Identify Storage Tiering		X	



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Data Transfer Review		X	
Identify Future State Recommendations		X	
Cost Optimization Proposal	X		
Cost Optimization Summary Report	X		
AWS Purchase Agreement Authorization			X
Purchase/Implement RIs/Savings Plan	X		
Authorize AWS Resource and Architectural Changes			X
Implement AWS Resource and Architectural Changes (excluding future State recommendations)		X	

- Items not covered in the project plan and/or responsibility matrix will be considered out of scope unless agreed to in writing.

3.4 SCHEDULING

- This Work Order is valid through the specified date indicated within and subject to agreement by Customer and InterVision to commence the in-scope services.
- Upon execution of this Work Order, Customer acknowledges and agrees that in establishing the Project start date, InterVision must reserve and allocate resources to deliver included services. It is typical for a period of up to six weeks to be required to establish and formally commence a project scope.
- InterVision requires fourteen (14) days prior written notice of any change, cancellation, or rescheduling of service dates and anticipated commitment acknowledged or agreed to by Customer. For any cancellations or rescheduling that reasonably impacts resource commitments and delivery of service contemplated within this Work Order, Customer may be charged for any travel expenses incurred, related service days, and consulting time if resources are not able to be reassigned or reallocated.
- InterVision is not responsible for any delays because of lack of access, requested information, cooperation, facility availability, fulfillment other Customer responsibilities, or due to changes in approach specified in this Work Order, and Customer may incur additional consulting time as a result of such delays.
- Non-Emergency: Customer may send scheduling requests via email at DL-Scheduling@intervision.com¹. InterVision will process these requests within one business day.

¹ <mailto:DL-Scheduling@intervision.com>



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- Emergency: This Work Order does not include emergency support services. Optional InterVision Managed Services support contracts are available for emergency services.

3.5 PROJECT COMPLETION

- Unless stated explicitly otherwise, acceptance of the services rendered in this Work Order and any deliverable provided as part of the stated scope will occur at completion of the applicable services, consistent with the terms and conditions within the Master Services Agreement.

4 CHANGE MANAGEMENT PROCESS

All changes to project scope will require an approved project change authorization form and be authorized consistent with the terms and conditions within the Master Services Agreement. Please reference Appendix A for a sample Project Change Order form.

5 DISCREPANCY RESOLUTION & ESCALATION

5.1 DISCREPANCY RESOLUTION

- Customer will bring any discrepancies to the attention of the InterVision Project Manager, first verbally, and, if requested by the InterVision Project Manager / InterVision Cloud Ops Specialist, in writing within one (1) workday of such request.
- The InterVision Project Manager / InterVision Cloud Ops Specialist will respond, first verbally, and, if requested by the Customer, in writing within one (1) workday of such request.
- Should Customer not be satisfied by the resolution proposed by the InterVision Project Manager / InterVision Cloud Ops Specialist, Customer may elect to escalate the situation via the Escalation Procedure outlined below.

5.2 ESCALATION

- While every effort will be made by the InterVision Project Manager / InterVision Cloud Ops Specialist and InterVision team working on the deployment of this project to comply with the terms of this contract, it may become necessary for the Customer to escalate an issue or issues. The following is the procedure to ensure that InterVision management is fully engaged and/or aware of any situation the Customer deems necessary.
- Notify the primary InterVision Manager listed below verbally and via e-mail within one (1) workday of such request.
 - Vice President Professional Services
- The InterVision Manager will respond, first verbally, and, if requested by the Customer, in writing within two (2) workdays of such request.

6 LOCATION OF WHERE SERVICES ARE TO BE PERFORMED

- Services will be performed with remote resources and from remote locations in communication and coordination with Customer designated contacts as agreed upon by Customer and InterVision.
- On-site work to satisfy the Work Order or otherwise requested will be requested by the Customer and agreed upon in advance by both InterVision and Customer and will be subject to incremental fees and travel provisions in Section 7.2.



7 COST & PAYMENT

7.1 PROJECT FEE PAYMENT SCHEDULE

This service is available as a fixed fee service with a cost savings guarantee. For a Customer transferring their AWS billing management, or “Partner of Record” relationship to InterVision with a 2-year commitment and who meet the other conditions set forth below, the service fee will be waived. This option is considered a “zero-cost engagement with AWS account transfer”. (check the appropriate box below)

Fixed Fee Engagement with Cost Saving Guarantee

The total service fee is (check the appropriate box):

- \$31,500 - Customer with under \$30K monthly AWS spend
- \$40,500 - Customer with \$30K to \$60K monthly AWS spend
- \$49,500 - Customer with over \$60K monthly AWS spend

The fixed fee service payment schedule will be as follows:

- **1st Payment of 50% of the service fee** will be invoiced upon order placement.
- **Final Payment of 50% of the service** will be invoiced upon project completion which is generally 4-6 weeks following the project kick off. Cost Saving Guarantee Credits applied, if any, to the final payment.

Cost Saving Guarantee is detailed in Section 7.2.

Zero Cost Engagement with AWS account transfer. Service fee is waived under the following conditions:

InterVision will waive the service fee with the transfer of your AWS account billing to InterVision and a 2-year commitment to retain InterVision as your partner of record for AWS. The AWS account assignment must be executed prior to this service being initiated. This option with waived service fee is available to a Customer spending a minimum of \$20,000 a month with AWS prior to the cost optimization service execution. Customers with AWS spend below \$20,000/month are not eligible and subject to the service fee listed above.

Customers that withdraw the AWS account assignment from InterVision prior to the minimum term obligation are subject to pay the Cloud Cost Optimization fee as identified in the Fixed Fee Engagement section above.

8 COST SAVINGS GUARANTEE

InterVision offers a Cloud Cost Saving Guarantee. The Cost Saving Guarantee promises that the identified cost saving across all recommendations, other than the items indicated as “future state”, will total a minimum of 30%. If InterVision fails to identify 30% in total savings, then a Cost Optimization service fee credit will apply per the table below.

Identified Cost Savings Attainment:	CCO Service Credit %
30% or above Savings	0%
25% to 29.5% Savings	10%



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20% TO 24.9% Savings	20%
15% to 19.9% Savings	30%
<14.9% Savings	50%

Cost Saving Guarantee Terms & Conditions:

- Credits will be applied to the final payment.
- Credits do not apply to this service if the service is either provided free or discounted in any way.
- Minimum monthly AWS spend of \$20,000 is required to qualify for Cost Savings Guarantee.
- Customer must provide all necessary inputs and access to allow InterVision to run the complete assessment in a timely manner (6-weeks from kick off meeting to recommendations).
- Cannot have participated in a Cost Optimization or Well Architected review in the previous 12-months.
- Currently, not utilizing AWS reserved instances prior to the review.
- Saving percentage is based upon identified savings:
 - Saving Guarantee is inclusive of savings due to removal and or scheduling of unused, idle and or unnecessary resources, right-sizing of resources, storage tiering, data transfer optimizations, and saving plans/credits/reserved instances.
 - The following represent additional future state savings that may be identified above and beyond the InterVision saving guarantee: re-platforming, re-factor, re-architecture, and design changes.
- AWS Purchase Agreement (APA) is required to execute maximum cost savings.

8.1 ADDITIONAL SERVICES RATE SCHEDULE

Additional services outside of scope of this work order and authorized by Customer, will be billed on an hourly basis. InterVision will invoice actual hours on a monthly basis. The travel costs will be the responsibility of the Customer and subject to the Travel & Expense section within this document.

Customer agrees to the follow rate structure:

Resource Level	Std. Rate
Sr. Project Manager (Cloud Ops Specialist)	
Senior Program Manager	
Cloud Engineer	
Cloud Architect	

Rates above assume work will be performed during normal business hours (M-F 8AM-6PM PST)

After-Hours Adjusted Rate

The following rate accelerators apply for the service types listed above:



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Rate	
After Hours Rate	Standard x 1.3

*After-hours services are services performed outside InterVision's standard office hours of Monday-Friday, 8:00AM to 6:00PM PST, including holidays.

NOTE: Customers will be invoiced a minimum of 1 hour for remote services requests and 4 hours for onsite requests.

8.2 TRAVEL & EXPENSES

InterVision will bill the Customer for travel and expenses relating to work done outside a 50-mile radius from the local InterVision office.

Office Locations

<https://www.intervision.com/contact-intervision>

Expenses will be invoiced based on actual costs to InterVision, mileage at current calendar year rate, per GSA, and travel time will be invoiced at half the travel time.

InterVision will adhere to the following GSA schedule for all travel-related expenses.

<http://www.gsa.gov/portal/category/100000>

9 MISCELLANEOUS

1. Pricing and Payment. During the term of this Agreement, all pricing for the Services will continue unchanged as set forth in the Work Order, unless otherwise agreed to by InterVision and Customer in writing.
2. Upon expiration of the Term, all renewals will be set forth in writing in a master services agreement and/or work orders acceptable to InterVision and Customer.
3. Any and all warranties for the Services are set forth in the Master Services Agreement. All other warranties are specifically disclaimed. Nothing set forth in this Work Order shall be deemed to provide any additional warranty. InterVision further does not warranty and hereby disclaims any warranty of uninterrupted or error-free operation.
4. Suspension or Termination of Service. All services are subject to compliance with the InterVision MSA, this Work Order and the APA and any other AWS agreements identified in any of the foregoing. Non-compliance may result in suspension or termination of the services, this Work Order or the MSA. If Customer uses the services in violation of any applicable law or fraudulently, InterVision may suspend the services, or InterVision may terminate the services, this Work Order and/or the MSA.
5. This Work Order may be executed in multiple counterparts, each of which will be the original, and such counterparts together will constitute one and the same agreement. Execution may be affected by facsimile or electronic delivery of signature pages.

