

## **MAP Service Description**

### **IAM Advisory Services**

Summary of Services: Provide Client with an Identity and Access Management (“IAM”) Maturity Assessment Program (“MAP”) benchmark service, and optional add-on Services: Option 1-Use Cases and Gaps Discovery; Option 2-Architecture for Future State, with IAM Strategy and Roadmap; and Option 3-Product or Tool Vendor Selection.

#### **Scope of Maturity Assessment Program Services:**

Simeio will review eight (8) levers across all of IAM which contain the seventy-seven (77) most important measures a technology leader can use to evaluate the progress of their IAM program. These eight (8) levers, the description, and number of Measures are:

#	Name	Description	Qty of Measures
1	User Identity Stores	The sources of user(s) identities are effectively and efficiently organized to manage the number and accuracy of stores of user information across the enterprise that will be used for downstream provisioning, authentication, or credential management	7
2	User Account Provisioning	Account provisioning is the process of creating user accounts for systems and applications across the enterprise.	12
3	Credential Management	Managing credentials or passwords includes the initial creation, reset processes, and establishes appropriate standards and policies.	8
4	Authentication and Authorization	Authentication and authorization are the processes of proving who an individual is and that the individual is appropriately authorized to access information.	9
5	Identity Governance	Identity governance or role and compliance management is a set of processes that allows system owners to easily understand access rights, pro-actively manage user roles and privileges, and also satisfy possible audit and compliance requirements.	11
6	Reporting and Auditing	Fully featured IAM reporting and auditing provides a robust set of capabilities that can track all user life cycle activities, report the data for auditing and key metrics in a dynamic and flexible manner, and integrate the data into security intelligence tools for further correlation and analysis.	12
7	Operations	A mature IAM operational models include having a scalable, redundant architecture and infrastructure, the right on-premises vs. cloud mix, and the people and processes required to manage, operate, and support an IAM program.	10
8	Program Governance	An IAM governance program enables the enterprise to plan, establish, enforce, and review the plans, policies, and procedures an enterprise will leverage to advance to a fully mature state.	8

#	Name	Description	Qty of Measures
	Total		77

The MAP will be delivered by Simeio in a workshop format with Client stakeholders over the course of one (1) or two (2) days.

Results will be provided in a PowerPoint format to include a score from “poor” to “best” for each lever at the strategic level, and for each of the measures at the tactical level (see Deliverables section below).

#### **Optional Add-on Services:**

##### **Option 1. *Use Cases and Gaps Discovery* (AS-MAP-UCGD-02)**

The Use Cases and Gaps Discovery assessment will span across Identity Governance and Administration (“IGA”), Access Management (“AM”), Privileged Access Management (“PAM”), and if applicable, Customer Identity and Access Management (“CIAM”). This scope will include the prioritization of use cases; identification and design of the high-priority processes; identification and listing of the associated policy and process gaps to fulfill the business’ needs across IAM; and the gaps in technology and tools that are utilized across the IAM ecosystem.

##### **Option 2. *IAM Strategy, Program Roadmap, and Architecture Framework* (AS-MAP-STPRAF-03)**

Building on the MAP workshop results along with the results from the Use Cases and Gaps Discovery a client-specific strategy for a wholistic IAM transformation program is created. The strategy will be supported by current state architecture, a roadmap of tactical and strategic projects, the implementation visual and approach, and a preliminary program budget. Defining the future state architecture and interim-state architecture for the next two to three (2-3) years completes this Option.

##### **Option 3. *Technology Vendor Selection* (AS-MAP-TVS-04)**

Option 3 Leveraging the results from the Use Cases and Gaps Discovery we assist the Client in selecting appropriate vendors for the technology/tools needed in IGA, AM, PAM or CIAM. If more than one capability tool is needed, this scope will be duplicated for that capability, for example IGA and PAM.

#### **Simeio Roles and Responsibilities**

##### **MAP**

Role	Responsibility
Simeio Sales and Relationship Manager	<ul style="list-style-type: none"> <li>Overall relationship management.</li> <li>Engage with the Client team on forward looking opportunities.</li> </ul>
Solutions Engineer	<ul style="list-style-type: none"> <li>Define scope requirements, use cases, needs suitable to close gaps.</li> </ul>
IAM Solutions Advisor	<ul style="list-style-type: none"> <li>Provide subject matter expertise and lead the overall assessment.</li> <li>Assist with review of deployed processes and operational procedures.</li> <li>Deliverable development.</li> </ul>

Role	Responsibility
	<ul style="list-style-type: none"> <li>Responsible for interfacing with executive leadership.</li> <li>Overall accountability for quality of Deliverables.</li> </ul>

### *Option 1: Use Cases and Gap Discovery*

Role	Responsibility
Simeio Sales and Relationship Manager	<ul style="list-style-type: none"> <li>Overall relationship management.</li> <li>Engage with the Client team on forward looking opportunities.</li> </ul>
Project Manager	<ul style="list-style-type: none"> <li>Oversee overall project team.</li> <li>Manage Deliverables schedule and dependencies.</li> <li>Review Deliverables prior to delivery to Client.</li> </ul>
Business Analyst	<ul style="list-style-type: none"> <li>Conduct discovery of current state, people, and process.</li> <li>Conduct workshops regarding future state.</li> <li>Document findings and gaps.</li> <li>Document recommended roadmap.</li> </ul>
IAM Architect	<ul style="list-style-type: none"> <li>Architecture and design review.</li> <li>Oversee technical analysis and roadmap activities.</li> <li>Provide domain expertise.</li> </ul>
IAM Solutions Advisor	<ul style="list-style-type: none"> <li>Provide subject matter expertise and lead the overall assessment.</li> <li>Assist with review of deployed processes and operational procedures.</li> <li>Assist with creation of roadmap.</li> <li>Deliverable development.</li> <li>Provide expertise around operations and governance setup.</li> <li>Responsible for interfacing with executive leadership.</li> <li>Overall accountability for quality of deliverables.</li> </ul>

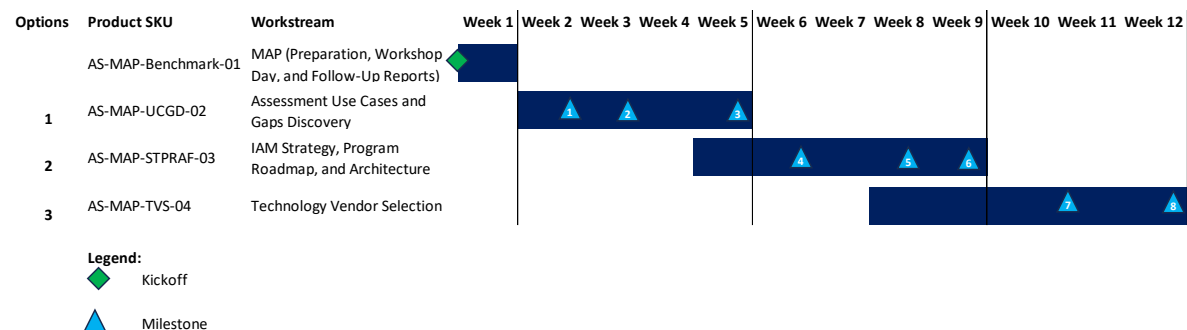
### *Option 2: IAM Strategy, Program Roadmap, and Architecture Framework*

### *Option 3: Technology Vendor Selection*

Role	Responsibility
Simeio Sales & Relationship Manager	<ul style="list-style-type: none"> <li>Overall relationship management.</li> <li>Engage with the Client team on forward looking opportunities.</li> </ul>
Solutions Engineer	<ul style="list-style-type: none"> <li>Defining scope requirements, use cases, needs suitable to close gaps.</li> <li>Defining solutions and pricing.</li> <li>Creating contract.</li> </ul>

Role	Responsibility
Project Manager	<ul style="list-style-type: none"> <li>Oversee overall project team.</li> <li>Manage Deliverables schedule and dependencies.</li> <li>Review Deliverables prior to delivery to Client.</li> </ul>
Business Analyst	<ul style="list-style-type: none"> <li>Conduct discovery of current state, people, and process.</li> <li>Conduct workshops regarding future state.</li> <li>Document findings and gaps.</li> <li>Document recommended roadmap.</li> </ul>
IAM Architect	<ul style="list-style-type: none"> <li>Architecture and design review.</li> <li>Oversee technical analysis and roadmap activities.</li> <li>Provide domain expertise.</li> </ul>
IAM Solutions Advisor	<ul style="list-style-type: none"> <li>Provide subject matter expertise and lead the overall assessment.</li> <li>Assist with review of deployed processes and operational procedures.</li> <li>Assist with creation of roadmap.</li> <li>Deliverable development.</li> <li>Provide expertise around operations and governance setup.</li> <li>Responsible for interfacing with executive leadership.</li> <li>Overall accountability for quality of deliverables.</li> </ul>

### Timeline



**Milestones**

Product	Milestone	Estimated date
MAP	MAP Workshop Completed	Kickoff + 5 Days
Option 1: Use Cases and Gap Discovery	<ol style="list-style-type: none"> <li>1. Use Cases Defined Per IAM Capability (IGA, AM, PAM, and CIAM).</li> <li>2. Processes designed and documented.</li> <li>3. Gaps Analysis Completed and Deliverables Reviewed with Client.</li> </ol>	<ol style="list-style-type: none"> <li>1. Kickoff + 2 Weeks</li> <li>2. Kickoff + 3 Weeks</li> <li>3. Kickoff + 5 Weeks</li> </ol>
Option 2: IAM Strategy, Program Roadmap, and Architecture Framework	<ol style="list-style-type: none"> <li>4. Strategy defined and documented.</li> <li>5. Roadmap projects and preliminary program budget defined with Architecture diagrams.</li> <li>6. Final deliverables reviewed and accepted by Client.</li> </ol>	<ol style="list-style-type: none"> <li>4. Kickoff + 6 Weeks</li> <li>5. Kickoff + 8 Weeks</li> <li>6. Kickoff + 9 Weeks</li> </ol>
Option 3: Vendor Selection	<ol style="list-style-type: none"> <li>7. Vendors criteria defined and vendors selected.</li> <li>8. Vendor scoring, pricing and decision recommendation.</li> </ol>	<ol style="list-style-type: none"> <li>7. Kickoff + 10 Weeks</li> <li>8. Kickoff + 12 Weeks</li> </ol>

**Deliverables**

Deliverables
<p>MAP</p> <ul style="list-style-type: none"> <li>• 1 – Graphical representation of the 8-levers score (1-10).</li> <li>• 1 – Heat map of each lever and question to emphasize items to address.</li> <li>• 1 – Prioritized list of scored benchmark items to address and the comparative Best Practice score.</li> <li>• 1 - Documented tactical (short-term) and long-term improvements agreed with Client during the workshop.</li> <li>• Deliverables in Microsoft PowerPoint</li> </ul>
<p>Option 1. Use Cases and Gaps Discovery</p> <ul style="list-style-type: none"> <li>• Inventory of prioritized use cases</li> <li>• 5-10 high priority processes defined</li> <li>• List of associated policy, process, business needs gaps</li> <li>• Technology gap assessment</li> <li>• Deliverables in Microsoft PowerPoint</li> </ul>
<p>Option 2. IAM Strategy, Program Roadmap, and Architecture Framework</p> <ul style="list-style-type: none"> <li>• Current state architecture</li> <li>• Tactical project listing</li> <li>• Strategic project listing</li> <li>• Implementation approach visualization</li> <li>• Preliminary program budget</li> <li>• Future state architecture</li> </ul>

<ul style="list-style-type: none"> <li>Interim state architecture(s)</li> <li>Deliverables in Microsoft PowerPoint</li> </ul>
<ul style="list-style-type: none"> <li>Option 3. Technology Vendor Selection           <ul style="list-style-type: none"> <li>Optional service depending on Gaps, Program Roadmap and assistance required</li> <li>Identification of qualification criteria or use cases for vendors and the IAM software tools required (MS Excel)</li> <li>Identification of scoring criteria and scoring matrix (MS Excel)</li> <li>Vendor engagement – Recorded meetings with MS Teams and Meeting Notes in MS Word</li> <li>Vendor scoring results for scoring criteria and use-cases (MS Excel and PowerPoint)</li> <li>Vendor pricing and comparison (MS PowerPoint)</li> <li>Vendor selection recommendation / decision guidance (MS PowerPoint)</li> </ul> </li> </ul>

### Client Roles and Responsibilities

#### MAP

Role	Responsibilities	Effort
Human Resources (“HR”)	Data flowing from HR begins, ends and modifies user access.	8 Hours
Architects	Enterprise and Security Architects that understand the overall Information Technology landscape and key integration implications.	8 Hours
Business Application Owners	Business application stakeholders that need rapid and efficient employee or customer access and can define access roles.	8 Hours
Compliance/Internal Audit	Compliance, Audit, Legal and data privacy and governance stakeholders.	8 Hours
Helpdesk	Helpdesk and support staff who know the problems and can influence process improvement.	8 Hours
IT Networking, Security, Infrastructure and Telecom	Infrastructure, Network, Security Administrators who manage security and access via privileged accounts or highly privileged identities.	8 Hours
AD & Cloud Teams	Resources who manage Identity attribute repositories both on premise and in the cloud.	8 Hours
CISO	Key influencers and stakeholders who will approve funding and resolve conflicting priorities.	8 Hours
IAM Tool / Product Owners	Owners of specific IAM tools used today who can validate extent of capabilities used.	8 Hours

## Service Description



Project Sponsor	Responsible for budget, goals, strategy.	1-2 Hours
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### *Option 1: Use Cases and Gap Discovery*

Role	Responsibilities	Effort
Project Sponsor	Responsible for budget, goals, strategy.	1-2 Hours
Project Manager	Plan and manage the assessment within the Client team(s). Coordinate with the Simeio Project Manager / Architect.	8 Hours
IAM Solution Architect / Technical Leads	Accountable for IAM tools design, architecture, etc.	6 Hours
System Administration	Personnel to assist Simeio to gain data / reports / info where/when needed. Or provide data to Simeio per analytical request.	10 Hours
Application Administrators	Subject matter experts (“SME”) regarding use cases for business applications.	4 Hours
Business Stakeholders	Stakeholders representing the business lines, GRC / external audit liaison, business managers who review access.	3-5 Hours

### *Option 2: IAM Strategy, Program Roadmap, and Architecture Framework*

### *Option 3: Technology Vendor Selection*

Role	Responsibilities	Effort
Project Sponsor	Responsible for budget, goals, strategy.	1-2 Hours
Project Manager	Plan and manage the assessment within the Client team(s). Coordinate with the Simeio Project Manager / Architect.	8 Hours
IAM Solution Architect / Technical Leads	Accountable for IAM tools design, architecture, etc.	6 Hours

### *Client Responsibilities*

1. Identify names of the Client resources who perform the Client roles and responsibilities identified above and assist to facilitate availability, participation and attendance as needed for workshops and meetings.
2. Provide current and existing documentation, such as build documentation on existing IAM tools, architecture, policies, procedures, etc. as needed by Simeio.
3. Provide vendor contact information for existing IAM tools.

**RACI Matrix:**

The following RACI matrix is intended to outline the various activities that will be performed by the Client and Simeio.

Services	Responsible	Accountable	Consulted	Informed
Identify stakeholders	Client	Client	Simeio	Simeio
Schedule workshops with Client stakeholders facilitated by Simeio	Client	Client	Simeio	Simeio
Conduct and facilitate workshops	Simeio	Simeio	Client	Client
Provide information and data as requested	Client	Simeio	Simeio	Client
Review data and workshop / interview and provide analysis	Simeio	Simeio	Client	Client

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