# **Consulting Project Initiation Process**

Following is the process for initiating consulting projects:

1. **SSS –** 
   1. The SSS will move the opportunity to Closed / Won in NetSuite.
   2. They will submit the Sales Order in NetSuite for processing by Accounting and the Scheduling team,
2. **Delivery Operations Coordinator –** 
   1. The Delivery Operations Coordinator will check documentation to ensure it is complete and accurate.
   2. They will set the project up in NetSuite for time entry.
3. **AE –** 
   1. **The AE will take the lead in ensuring the Sr. Manager of Consulting Services builds the project team and that the Manager of Service Delivery assigns a Delivery Manager to the project.** 
      1. **The AE will frequently follow-up internally to ensure this is done.**
   2. **The AE and Client will decide on the Kick-Off date.**
   3. **The AE will attend the Internal Hand-off Meeting.**
   4. **They will attend the Client Kick-off Meeting.**
4. Senior Manager of Consulting Services –
   1. The Sr. Manager of CS will build the Project Team based on individual skill sets and availability.
   2. They will collaborate with the Manager of Service Delivery to understand who she wants to assign as Delivery Manager.
5. Scheduling Coordinator –
   1. The Scheduling Coordinator will confirm that the Opportunity / Sales Order match the Statement of Work documentation in the Finals Folder once it has been marked “Closed Won.”
   2. They will create the project from the Sales Order form and SoW.
   3. Once the Delivery Manager (DM) is chosen, the SC will send the assignment email to the:
      1. Delivery Manager (DM)
      2. Account Executive (AE)
      3. Solutions Architect (SA)
      4. Project Team Members
      5. Consulting (CS) Leadership
6. The email will include the following information:
   1. **Project Team**
      1. Structure
      2. Roles
      3. Names
   2. **Link to final documents on EPIC:**
      1. SoW
      2. Deal Sheet
   3. **Targeted Start Date**
      1. Internal handoff
      2. Client Kick-off
7. **AE –** 
   1. **When the AE receives the email, they should:** 
      1. **Send DM introduction email to client contacts:**
         * **Client Project Sponsors**
         * **Client Project Manager**
8. Consulting Delivery Manager – When the CS DM receives the email they should:
   1. Schedule an Internal Hand-off Meeting and include the following on the invitation:
      1. AE
      2. Assigned Project Team Members
      3. SA
      4. Scheduling Coordinator and CS Leadership (as needed)
   2. Send the Internal Hand-off meeting notes (or link to project OneNote) to all attendees post-meeting.
   3. Attend the Internal Hand-off meeting as needed and provide oversight on:
      1. Scheduling
      2. Resource contention

* 1. **Communicate when the Service Now (SNOW) time entry set-up is complete, and send to:** 
     1. DM
     2. Project team member(s)
  2. **Attend the Internal Hand-off Meeting and provide information on:**
     1. Client background
     2. Key players
     3. Project drivers
     4. Client defined deadlines
     5. Budget and expense expectations
     6. Logistics
  3. **Facilitate the Internal Hand-off Meeting as follows:**
     1. Coordinate the meeting and keep it on track.
     2. Clarify any prepared questions about the SoW.
     3. Take notes and send them out after the meeting.
     4. Document and schedule next steps for the Kick-off Meeting.
     5. Communicate SNOW project specifics and details
  4. **Schedule the Client Kick-off Meeting and include the following on the invitation:**
     1. Client Sponsor
     2. Client Project Manager
     3. Client Project Team
     4. Assigned iVision project team members
     5. AE
     6. SA (as needed)

1. The following should all attend the Client Kick-off Meeting:
2. Client Sponsor
3. Client PM
4. Client Project team
5. Assigned iVision project team members
6. AE
7. SA (as needed)
8. **AE –** 
   1. **The AE will lead the sales portion of the Internal Hand-off to the Project Team.**
9. CS DM –
   1. The CS DM will attend the Internal Hand-off Meeting and provide technical leadership as follows:
      1. They will walk through the overall technical scope and approach.
      2. They will clarify any prepared questions about the SoW.
      3. The CS DM will raise any project concerns, risks, etc.
      4. They will communicate Approved Paid Leave (APL) and scheduling conflicts
   2. They will collaborate with the Delivery Manager on project next steps, etc.
   3. They will attend the Internal Hand-off Meeting and provide the following leadership as follows:
      1. They will validate the project team’s understanding of scope and approach.
      2. They will clarify any discrepancies or concerns.
   4. The CS DM will answer questions regarding:
      1. Scope
      2. Client
      3. Project drivers
      4. Client defined deadlines, etc.
10. ESS DM – should:
    1. **Attend the Internal Hand-off Meeting, only if the project is for an ESS Client:**
       1. The ESS DM will serve as a point of contact for determining impact to services under management by ESS; specifically related to change management process, etc.