

Project Stalled - Customer Nonresponsive

09/16/2024 2:56 pm EDT

[Purpose](#)

[Process Steps](#)

[Escalate to Sales Ops](#)

During a project, the customer may become unresponsive to moving the project forward thus the project stalls. This document provides a guideline for ensuring all efforts are exhausted to engage the customer to move forward and the requirements necessary before a stalled project can be closed.

Unresponsive is defined as a customer who has not responded to a request from a project team member for 7 days and no out-of-office message for the customer has been received. Or if a customer has missed a scheduled appointment or deadline without communicating prior.

The flowchart linked [here](#) guides the process.

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The following steps will guide the Project Manager (PM) through managing a stalled project once the customer has become unresponsive:

1. Project sold under new MSA (February 2023?)
 1. Yes – follow the [Project Closure - Hours Expired](#) process
 2. No – continue to step 2
2. Update the following Project fields
 1. Project Status: Stalled
 2. Dependency: Customer
3. Add a project task to track the stalled duration
 1. Name: Stalled
 2. Start Date: Today
 3. End Date: 7 days out
4. Send stalled notification to customer and customer project sponsor from Stalled task:
 1. Template: [Project Stalled](#)
5. Customer Responds
 1. Yes – continue working on the project
 2. No – move to step 6
6. Call Customer and follow up with email to customer/customer project sponsor
 1. Script and email template: [Project Stalled 2nd attempt voicemail follow up](#)

7. Customer responds

1. Yes – continue working project
2. No – move to step 8

8. Send final email to customer

1. Template: [Project Stalled Final Notice](#)

1. Informs customer project has been pulled from schedule and under review for closure

If no response is received and the project cannot move forward, escalate the project to Sales Ops for additional follow-up attempts.

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If no response is received from the customer after the attempts above, the project is escalated to Sales Ops to attempt to move forward:

1. Update Project fields:

1. Project Status Reason: Escalated
2. Dependency: Sales Ops
3. Project Chatter: reference stalled task with all notes in attempts to engage the customer and any additional information that will help Sales Ops with leverage to move the project forward

Sales Ops will then review and work with the customer to drive the project forward. Upon completion, they will update the following for the PM:

- Project Chatter Notes: updated with details of their discussion and project status
 - Status:
 - Continue working
 - Move to Contract Cancellation
 - Move to Customer Terminated
 - @mentioned the PM
- Project Status Reason: Active
- Dependency: None

The PM will then follow the path outlined by Sales Ops outlined as status in the Chatter notes.

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