

Project Closure - Hours Expired

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Purpose

Every project sold with Services Hours will have an expiration date when those hours are required to be consumed. Hours MUST BE CONSUMED by the expiration date (not just scheduled). For full details regarding project hour expiration, review the [Master Services Agreement](#) under section 7. Payment and Taxes.

It is important to note that the expiration dates (90/60/30 days prior to the expiration date) are not related to the 90 day RMR billing date and have no impact on when RMR is billed. See the [Project - Terms and RMR Billing](#) process for specifics related to customer billing of ongoing maintenance fees. These are two separate functions.

This document will assist Project Managers (PM) and the Director of Professional Services with the proper steps to notify a customer 90, 60, and 30 days prior to their project hours expiring and closing a project when the hours have expired. It will also provide a guide for requesting an extension to the expiration date.

The Project Closure - Expired Hours flowchart linked [here](#) will assist with process flow.

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Project Fields and Tasks

The project templates will include the following:

- Field:
 - Expiration Date - The date the hours sold for the project will expire.
 - Hours expire 6 months from the contract signing date unless the Director of Professional Services approves an extension
 - PMs should never update this field, only the Director of Professional Services can change the date.
- Tasks: The PM/Director or Professional Services will be responsible for scheduling and maintaining the delivery of the expiration notices during the lifespan of the project:
 - Expiration – 90 Day Notice
 - Owner: PM
 - Start Date and Estimated End Date = 90 days prior to Project Field: Expiration Date

- Expiration – 60 Day Notice
 - Owner: PM
 - Start Date and Estimated End Date = 60 days prior to Project Field: Expiration Date
- Expiration – 30 Day Notice
 - Owner: Director of Professional Services
 - Start Date and Estimated End Date = 30 days prior to Project Field: Expiration Date
- Expire Hours
 - Owner: Director of Professional Services
 - Start Date and Estimated End Date = date hours expire

In some cases, the project duration may be shorter than 6 months from expiration. For projects delivered completely prior to the expiration notice(s) or expiration date, the project can be closed complete as per standard process. The expiration tasks will be updated to reflect it was not applicable at the time of project closure.

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Expiration Notices

At each expiration notice date, the PM and Director of Project Management, will review the project to determine if an extension is warranted. If so, or the customer asks for an extension, follow the steps under the section [Requesting Expiration Extension](#).

If no extension is warranted, the PM or Director of Project Management, will send the customer the following Expiration Notice from the related task to document notification:

- 90 Days Prior - [Hours Expiring - 90/60 day notice](#)
 - Sender: PM
 - Recipients: Customer's project manager and project sponsor (if different than their project manager) only.
- 60 Days Prior - [Hours Expiring - 90/60 day notice](#)
 - Sender: PM
 - Recipients: Customer's project manager and project sponsor (if different than their project manager) and Bold project team members only.
 - If no immediate response is received, the PM will transfer the project to the Director of Project Management for the balance of notifications
- 30 Days Prior - [Hours Expiring - 30 day notice](#)
 - The Director of Project Management will work with the Sales Representative to re-engage the customer
 - If no response, the Director will send this final notice
 - If customer responds, the Director will transfer the project back to the PM
 - Sender: Director of Project Management
 - Recipients: Customer's project manager and project sponsor (if different than their project manager) and Bold project team members only.

Any and all responses to and from the customer must be uploaded to the task to document the conversations. This is required to assist in the event of any customer disputes.

Expiring Hours

If there is no response from the customer to schedule AND use the remaining hours before the expiration date, or the Director of Product Management has not approved an extension, the project can be closed as Expired using the following steps:

1. From the Expire Hours task, send the customer notice the hours have expired and the project is closed
 1. Template: [Hours Expired Project Closed](#)
 1. Recipients:
 1. Customer's project manager and project sponsor (if different than their project manager)
 2. Bold Project Team Members – to alert the team that no further work should be delivered under the project
2. Update the Project fields/tasks:
 1. Ensure all delivered tasks have time entered and status = Completed
 2. Ensure all expiration notices are uploaded to the project tasks and Opportunity File section
 3. Go Live Date – has been updated if the customer is live with the product
 4. Dependency = None
 5. Recovery Plan = Hours Expired
 6. Project Chatter = Status Update: No customer response to expiration notices, project hours expired
 7. Project Stage = Expired
3. An auto email notification will be sent to the following resources stating the project has been closed due to hours expiring:
 - Director of Professional Services - Project Management
 - Project PM
 - Support Manager for the project product type
 - Sales Manager for the project product type
 - Opportunity Owner
 - Sales Ops
 - Customer Account Manager
 - AR Billing team

Requesting Expiration Extension

During the course of a project, if the PM feels there is justification for an extension on the expiration dates, or the customer is requesting an extension, the PM will follow the process below for requesting and managing the outcome of the request:

1. Update the project fields:
 1. Project Status Reason = Escalated
 2. Project Dependency = Director of Professional Services
2. Schedule a Project Extension meeting with the Director of Professional Services

3. Document reasons for extension in Project Chatter along with meeting notes.

If the extension is approved:

1. Director of Professional Services: Update the Chatter notes with their approval
2. Director of Professional Services: Update the Expiration Date field with the new date
 1. Note: Only the Director of Professional Services can update this date!
3. PM – inform the customer of the new expiration date
4. PM – update the remaining expiration notices to align 90/60/30 days from new expiration date
5. PM – Update Project Status Reason and Project Dependency fields

If the extension is not approved:

1. Customer Requested: PM - Inform the customer the extension was denied and the remaining days to consume the hours
2. PM Requested: PM - Inform the customer of the hours expiration as per the standard process outlined in the [Expiration Notices](#) section
3. PM – Update Project Status Reason and Project Dependency fields

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