

Project Call Recap

01/09/2024 10:23 am EST

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Purpose

This document outlines the steps to provide all project stakeholders, internal or external, with a recap of project calls. It explains the different types of call recaps that are sent to customers, the templates used, and the information to provide in the emails. They serve as documentation of what was discussed during the customer calls as well as listing open tasks to be completed.

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Types of Calls to Recap

Every call with a customer should be followed up with a recap email.

The following are the different types of calls with customers that require a recap email:

- [Project Kick-Off Call](#)
- [Weekly Project Call](#)

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Project Kick-Off Call

The Kick-Off Call is the initial project call with the customer and project team members. At a minimum, it covers the introduction of project team members from Bold Group as well as the customer, the scope of the project, and what the customer can expect during the project.

After the call, a recap email should be sent out to all project participants and project stakeholders from within the Kickoff Call task in Salesforce. The recap email should be sent within 1 business day of the Kick-Off Call.

The basics of every recap should include:

- Thanking the customer for their time
- Overview of items discussed on the call
- The Implementation Plan for the project's completion and delivery
- Explanatory information regarding project steps
- Answers to any questions the customer may have had on the Kick-Off Call
- Instructions for customer on next steps moving forward
- List of Attachments/ documents needed for review
- Outstanding Action Items

The following templates and information can be used to create the recap email:

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AlarmBiller

Use template: 'AlarmBiller Kick off Call recap'

NOTE: Project scheduling is dependent upon the receipt of data

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Managely

Use template: 'Managely Kick off Call Recap'

NOTE: Project scheduling is dependent upon the receipt of data

If migrating from AlarmBiller, customers will indicate they have completed their data clean up

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Manitou

Use template: 'Recap Email' (from Project Activity, not Kickoff Activity screen)

NOTE: Project scheduling is dependent upon the receipt of a completed Implementation Checklist

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SedonaOffice

Use template: 'SedonaOffice KickOff Recap'

NOTE: Project scheduling is dependent upon the GL/Chart of Account set up and installation of SedonaOffice

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Weekly Project Call

After the initial kick-off call for a new implementation project, weekly calls with the project team are scheduled to keep the project moving. After the call, a recap is sent to all meeting attendees and project stakeholders (internal and external) listing the topics discussed and outstanding action items.

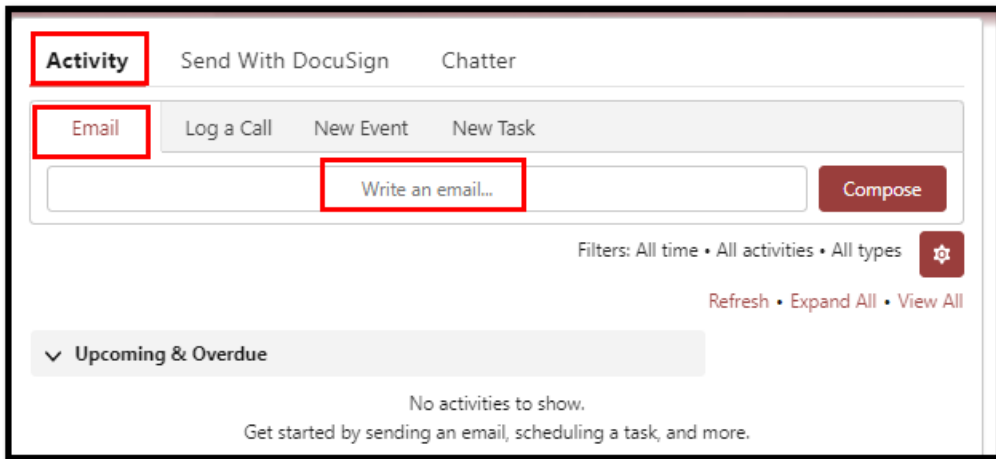
This recap is sent from the Project Activity section using the template: 'Recap Email' within 1 day of the call.

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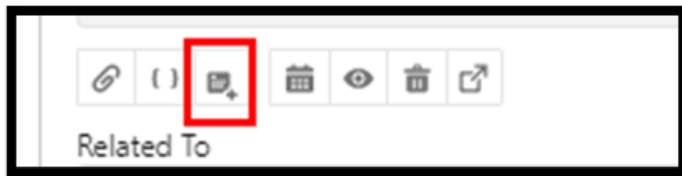
Creating the Email

From your project, open the Project Task view and locate the Kickoff task. Follow the steps below to create and send the email:

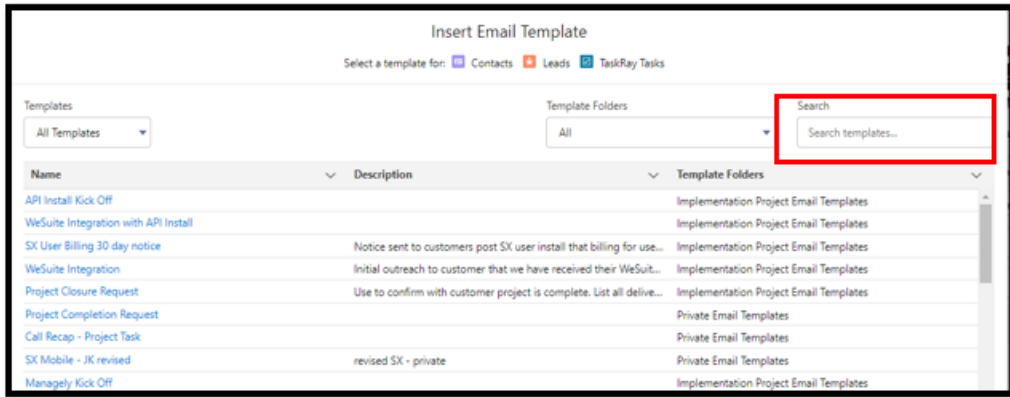
1. Open the Kickoff task or project
 - a. For Kick off call recaps – send them from Kick off task Activity section
 - b. For all other recaps -send them from the project Activity section
2. Under 'Activity' section select 'Email'
3. Click in the 'Write an Email' box



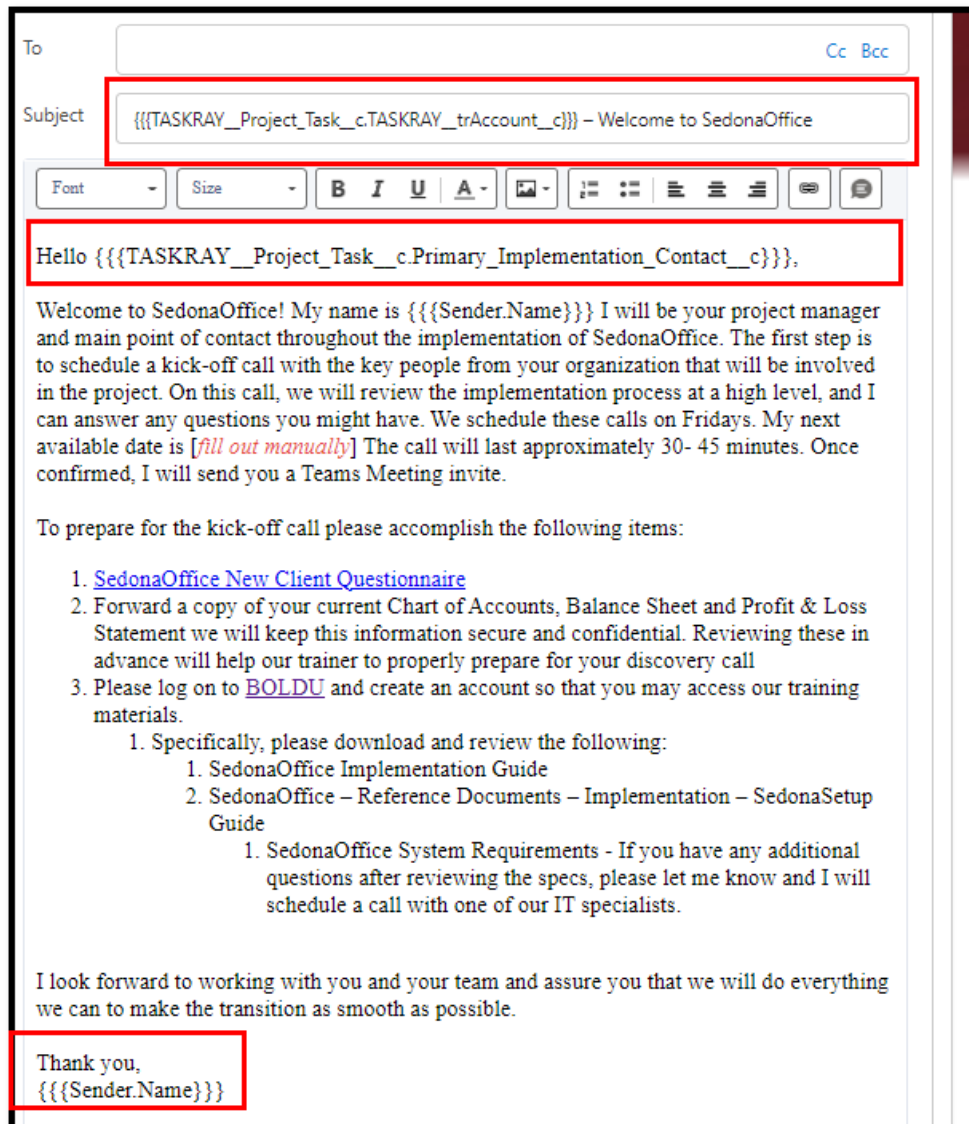
4. Enter the recipient(s) name in the 'To' field
 - a. Select the Primary Implementation Contact from the project's 'Customer Onboarding Information' section
 - b. Click 'cc' in the 'To' to copy recipients
5. From the bottom of the email, select the template icon to pull in a template to populate the email subject, content, and signature information



6. Select the appropriate template
 - a. Recently used templates will show in the list to select
 - b. Click Insert Template to locate additional templates
 - c. Search for the correct template by entering a template name in the Search box



7. Click on the template name to select it



1.

e. The template will populate the subject, content, and signature information

f. It pulls information from the project for all areas with brackets as shown above. Do not edit these fields.

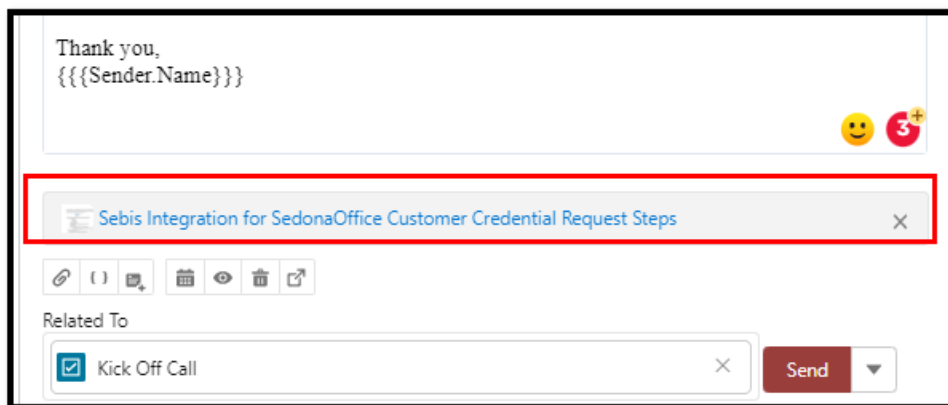
8. Edit the body of the email

a. Read the contents to ensure that the email template is appropriate.

b. Edit all areas in red with the correct information for the customer

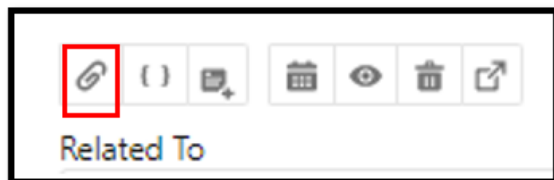
9. Review/Add email attachments

a. Review existing attachments and remove any that do not apply to the project



1.

b. Click the Attachment icon to upload additional attachments



10. Click Send to send the email

11. The email will appear in the Activity section

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