Consulting Hours Implementation Process

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Contents

Purpose

Consulting Hours may be sold outside of a new implementation for add-on module projects to assist the customer with various items:

- Additional Training
- New Resource Training
- Business Consulting
- Accounting Assistance
- SedonaSync Event Configuration
- Report Writing

A quote is provided to the customer to deliver these hours, along with a statement of work defining what the hours will be used for. A project is then created to track the hours delivered.

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Process Overview

The following steps should be taken after a quote for services hours is won:

1. Create project from template 'Consulting Hours'

2. Project Tasks

    a. Kick-off Email

        i. Template: 'Consulting Hours Purchased'

            i. Modify the template for item/hours purchased and resource that will be delivering the service

    b. Deliver Consulting Service

        i. Update estimated hours based on quoted hours

ii. Assign the task to a consultant

iii. @mention resource in Chatter to schedule service delivery

iv. Resource schedules services and @mentions PM with dates

v. Resource delivers service

i. Enters timecard

ii. Updates Chatter with a summary of the delivery

iii. Completes task

c. Confirm with the Customer Project is Complete

i. Use template “Project Completion Request’

3. Complete Project

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