Project Completion Confirmations

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Contents

Purpose

The purpose of this document is to outline the steps for requesting customer confirmation that a project delivered in full is complete and the steps for storing project completion notices and acceptance.

It is important to have the customer provide agreement, either via a signed document or email confirmation, that the project has been delivered in full, and no outstanding issues remain. This ensures that all parties agree that the scope of work deliverable has been met and the project can be officially closed. It prevents future non-billable projects from completing tasks the customer feels were never completed.

The following information will provide steps for adding a completion document to the project that is consistent and all Bold Group resources can be accessed easily

Return to Contents

Closure Document Requirements

Every effort should be made to gain approval from the customer that the project is complete. This should be done via a call, with a written request to the customer to respond to post call. At a minimum, a document should be sent requesting approval to close.

At this time the only requirement for the document is that the customer has stated in writing that the project has been delivered in full and the project deliverables are listed. From a project task within Salesforce, use the email template: Project Completion Request

Populate the Project Deliverables bullet items with the project deliverables and dates delivered and send it to the customer.

Save your document as Project Name - Project Completion Request and upload it to the project:

1. Open the project

2. Click Related

3. Scroll to the File section

4. Drag the document to the section or click Upload and select the file

Save the Document to the project Opportunity files section as well. This allows Support resources to see the documents they cannot access via TaskRay Projects.

If no response is received from the customer, send the customer notice the project is closed using the template: Project Closed

See Project Closure - Complete for the next steps to close the project.

Return to Contents

Saving the Project Completion Request and Approval Response

Once the confirmation from the customer is received, a copy of that email or document will be uploaded to the Project Files as follows:

1. Save the document to your drive using the following naming convention:
    a. Project Completion Approval: Project Name
2. Open the project
3. Click Related
4. Scroll to the File section
5. Drag the document to the section or click Upload and select the file
6. Open the linked Opportunity - Drag the document to the file section and save here as well
    a. This allows Support resources to see the documents as they cannot access Tvia askRay Projects.
7. The project can move to the next step in closing. See Project Closure - Complete for the next steps.

Return to Contents