

Sending a Project Kickoff Email

01/08/2024 12:00 pm EST

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Purpose

For all new projects, the Project Manager will send an introduction email or “kick-off” to inform the customer of the following

- Who is the Project Manager
- Introduction to the project
- Next Steps
 - Documentation for the customer to review prior to the next steps
 - Preinstall checklists or forms to be completed
 - Items to verify, such as current product version or On-Prem vs Hosted.

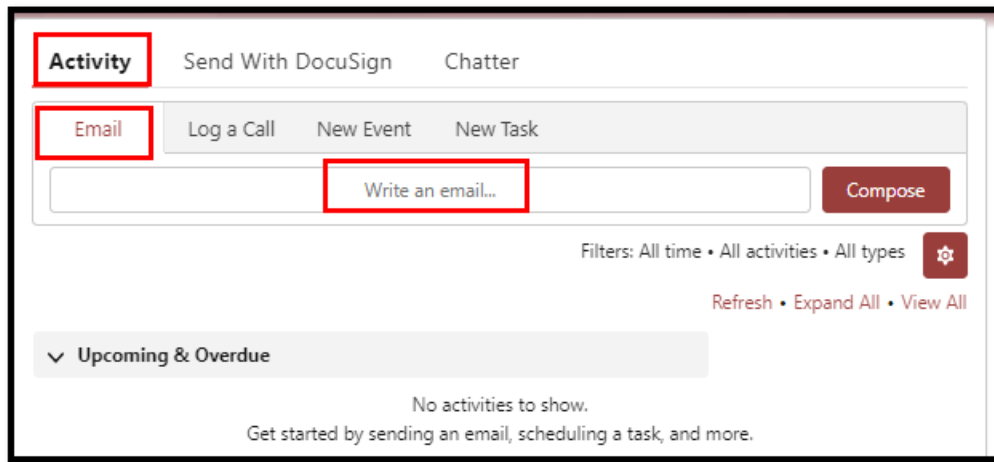
This article will outline the basics of sending a kickoff email for new projects. The basic steps are the same across all project types, the template used however will be different.

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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
2. Under the ‘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

Insert Email Template

Select a template for: Contacts Leads TaskRay Tasks

Templates:

Template Folders:

Search:

Name	Description	Template Folders
API Install Kick Off		Implementation Project Email Templates
WeSuite Integration with API Install		Implementation Project Email Templates
SX User Billing 30 day notice	Notice sent to customers post SX user install that billing for use...	Implementation Project Email Templates
WeSuite Integration	Initial outreach to customer that we have received their WeSuit...	Implementation Project Email Templates
Project Closure Request	Use to confirm with customer project is complete. List all delive...	Implementation Project Email Templates
Project Completion Request		Private Email Templates
Call Recap - Project Task		Private Email Templates
SX Mobile - JK revised	revised SX - private	Private Email Templates
Managely Kick Off		Implementation Project Email Templates

1.

d. Click on the template name to select it

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

To: Cc Bcc

Subject: {{{TASKRAY__Project_Task__c.TASKRAY__trAccount__c}}} - Welcome to SedonaOffice

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Hello {{{TASKRAY__Project_Task__c.Primary_Implementation_Contact__c}}},

Welcome to SedonaOffice! My name is {{{Sender.Name}}} I will be your project manager and main point of contact throughout the implementation of SedonaOffice. The first step is to schedule a kick-off call with the key people from your organization that will be involved in the project. On this call, we will review the implementation process at a high level, and I can answer any questions you might have. We schedule these calls on Fridays. My next available date is *[fill out manually]* The call will last approximately 30- 45 minutes. Once confirmed, I will send you a Teams Meeting invite.

To prepare for the kick-off call please accomplish the following items:

1. [SedonaOffice New Client Questionnaire](#)
2. Forward a copy of your current Chart of Accounts, Balance Sheet and Profit & Loss Statement we will keep this information secure and confidential. Reviewing these in advance will help our trainer to properly prepare for your discovery call
3. Please log on to [BOLDU](#) and create an account so that you may access our training materials.
 1. Specifically, please download and review the following:
 1. SedonaOffice Implementation Guide
 2. SedonaOffice – Reference Documents – Implementation – SedonaSetup Guide
 1. SedonaOffice System Requirements - If you have any additional questions after reviewing the specs, please let me know and I will schedule a call with one of our IT specialists.

I look forward to working with you and your team and assure you that we will do everything we can to make the transition as smooth as possible.

Thank you,
{{{Sender.Name}}}

1.

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

7. 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

8. Review/Add email attachments

a. Review existing attachments and remove any that are not applicable to the project

Thank you,
{{{Sender.Name}}}

Sebis Integration for SedonaOffice Customer Credential Request Steps

Related To

Kick Off Call

Send

???????

2. Click the Attachment icon to upload additional attachments

Related To

9. Click Send to send the email

10. The email will appear in the Activity section

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Kick Off Templates

Below is a list of current Kick Off Templates by project type. Always review content fully to ensure correct template use. Notify the template owner of any template changes required

- AlarmBiller
 - New Implementation - Welcome to AlarmBiller
 - Add on Module – AlarmBiller Additional Module!
 - Eforms – AB-eForms Only
- API – API Install Kick Off
- Managely
 - New Implementation – Managely Kick Off
- Manitou
 - New Implementation – Welcome to Manitou!
 - Add on Module – Manitou – Add On Module/Reinstall
 - Additional Licenses – Manitou Licensing
- SedonaOffice
 - New Implementation - Welcome to SedonaOffice

- Server Migration – SedonaOffice Server Migration/Reinstall
 - Add on Modules – SedonaOffice Add on Module!
 - Additional Licenses – SedonaOffice Licensing
- Sedona-X Mobile
 - SedonaOffice – SX App for SO for FSU Customers
 - SedonaOffice – SX App for SO
- SIMS
 - New Implementation -
- stages
 - New Implementation -
- WeSuite
 - With API install – WeSuite Integration with API Install
 - Without API Install – WeSuite Integration

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