

Business Management Roles and Responsibilities

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IMPORTANT: It is not best practice for the name of a resource to be added to the contract. The contract should include requirements for the service and not the resource.

Val Faircloth & Josh Tafoya

- All SedonaOffice On Prem tasks
 - SQL
 - Installation
 - SedonaX
 - SedonaWeb
 - All Add On modules
- On Prem Net New SedonaOffice Implementation
- On Prem to Cloud migrations
 - Migrate the data
- SedonaSync (Val Only)
- Not in scope
 - QuoteWerks
 - BlackLeaf

Audrey Beckmann & Val Faircloth

- Managely Data Conversion
- SedonaOffice Data Conversion

Kaitlyn Denninger

- Application Services

Bob Esquerra

- CPA Services (Certified Public Accountant)

Cloud Team (Jeff Mack)

- All SedonaOffice Cloud tasks
 - SQL
 - Installation
 - SedonaX
 - SedonaWeb
 - All Add On modules
- Cloud Net New SedonaOffice Implementation
- On Prem to Cloud migrations
 - Spin up the environment
- On Prem - Support for SedonaOffice database work

Wayne OKeefe

General Consulting services (When named in the project description)

Dianne Carolan

SedonaSync Consulting services (When named in the project description)

Resource Update Process Exception:

Diane, Wayne, and Renee S. are the only resources who are not scheduled with a task in TaskRay. For these resources, the Project Manager must proactively gather status updates and apply those updates to the appropriate tasks within the project to ensure project tracking remains accurate.