

PMO Project Assignment Policy

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Purpose

This policy outlines the standard process and expectations related to Professional Services PMO project assignments and customer follow up timelines.

Project Assignment Schedule

Project assignments are conducted by the PMO every Wednesday and Friday. Once a project has been assigned during that assignment cycle, the assigned Project Manager is expected to initiate customer outreach no later than Tuesday of the following week.

Tier 0 / Tier 1 Customer Process

Tier 0 and Tier 1 customers with named Customer Success Managers assigned follow a separate process outside of the standard PMO assignment window. (Please review the [Post Sale Process to Kick Off Process](#) for more details.)

For these customers, project assignments may occur daily through coordination between PMO leadership and Customer Success leadership. These projects are assigned directly to the named Customer Success Manager to coordinate next steps, customer communications, onboarding alignment, and overall engagement activities.

Customer Communication Expectations

Sales teams should set customer expectations according to the standard assignment and outreach timelines outlined above.

Please note that delays may occur when assignment cycles or follow up windows fall during:

- Company holidays
- Approved FTO/PTO dates
- Other organizational closures or scheduling constraints

In these situations, slight delays in outreach should be anticipated and communicated appropriately to the customer.

Escalations and Exceptions

If an escalation or exception to the standard assignment process is needed, the Sales representative should coordinate through their direct manager. Sales leadership will then work directly with Professional Services leadership to review and manage the request appropriately.

Sales representatives should not contact the assigned Project Manager directly to request assignment exceptions, priority handling, or expedited engagement outside of the established process.
