**Summary Table**

|  |  |
| --- | --- |
| **Assessment Completion Date** | *<Date the assessment is finalized>* |
| **Request Help Number** |  |
| **Sales RH Approver** | *<To be filled after Prioritization Team Meets>* |
| **ASE Evaluator** | *<Who filled the tech assessment>* |
| **Requestor** | *<Seller>* |
| [**Estimated Effort**](#_Scope) | *<Total Estimated Effort in order to deliver the offering>*  Includes Paid hours (See [Appendix](#_Appendix_A:_Paid)) |
| **Opp Review Available** (Opps Only)**?** | Yes  No |
| [**Overall Risk**](#_Risk_Assessment) | High  Medium  Low  Summary:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Scope Brief** |  |
| **Conflicts** | *<Which RHs have conflicts (timeline, tenure, effort, overlaps)>* |
| **Suggested Partner** | *<Support to recommend a Partner>* |
| **Version** | *<Integer numbers (1,2,3…)>* |

**Recommendation:** When a revision takes place, a new table should be added with updated values, and keep previous tables, for change tracking.

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# **Problem Statement**

What? – What is the phenomenon?

Who? – Does the occurrence of this problem/phenomenon depend on people?

When? – Does the occurrence of this phenomenon depend on time factor?

Where? – Does the occurrence of phenomenon depend on the place?

Which? – Does the occurrence of this problem depend on any other parameter?

How many? – How many items involved?

How? – Detailed description of the problem considering all influencing actor.

*Should vs. Actual*

Ex. From [Date 1] to [Date 2], [blah blah blah] has been happening. [Bleh bleh bleh] should be happening, resulting in [strong financial or business impact]. *(no more than 25 words)*

# **Background**

Identify:

* Customer’s Product/Technology options
* Customer’s skillset
* Customer’s Timeline
* Customer’s previous experiences with NI – if useful and applicable

# **Goals** (Business goal)

Identify high level deliverables for business impact, how will this engagement drive revenue growth. – This could be mutual work with sales, for better understanding of the RH.

Sales results from Account Plan.

# **Scope**

Define clear expectations of what the engagement will cover, this could be done by enlisting a number of tasks or conditions. There must exist alignment between sales & support

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity** | **Estimated Effort (hours)** | **Paid/Unpaid** | **Engineer Level** |
| Activity 1 |  |  |  |
| Activity 2 |  |  |  |
| Activity 3 |  |  |  |

# **Out of Scope**

Identifying all the possible scope creeps that could happen could have a high LOE given the complexity of the engagement. But this section adds value when identifying scope creeps.

Use case: Reevaluation of an already engaged RH, but LOE changes, scope changes.

# **Work Requirements**

* Customers pre requisites
* Sales pre requisites
* ASE pre requisites

# **Deliverables/Milestones**

Define schedule of deliverables, milestones, and owner to each one of these deliverables for this project. Expected completion dates and predecessors for each milestone. Observe and document customer, and sales engagement.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Milestone | Start Date | End Date | Accountable | Predecessor |
| Milestone 1   * Deliverable 1 * Deliverable 2 | 4/1/2016 | 5/1/2016 | Seller |  |
| Milestone 2 | 4/18/2016 | 4/22/2016 | ASE |  |
| Milestone 3 | 5/2/2016 | 6/1/2016 | Customer | Milestone 1 & 2 |

# **Risk Assessment**

Evaluate overall risk from all the different perspectives given the project needs. This could be achieve by different methods such as Risk Matrix (likelihood vs. consequences), or Risk Management Worksheet

*Risk Matrix*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Negative Risk/Risk opportunities | Probability (1-10) | Impact (1-10) | Risk Scope (P x I) | Responses |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

*Risk Management Worksheet*

# **Appendix A: Paid services estimated rates**

The following tables stablish the relation between the engineer level delivering a paid offering and the cost associated to it. **For quoting please contact ASE & Consulting Services**. **Please use this prices as a references only, and not for quoting purposes, as they may change.**

|  |  |
| --- | --- |
| Description | Estimated Price USD |
| Hourly Consulting | $300.00 |
| On Site Consulting Services, per Day | $3,000.00 |
| Remote Consulting Services, per Day | $2,500.00 |