**Note:**

* Recruiting owns the Applicant and Placement Tabs (and Spring Ahead until this changes)

**Initiate Project (Key metrics: hours allocation to meet 38% profit margin, client-approved Project Strategy)**

* ***Engagement Manager or Internal Project Manager*:** Upon receipt of signed proposal/SOW and upon receipt of all consultant documents--
  + Add project and consultant details (Start Date, End Date, and FTE%) to whiteboard and continue to update, as needed
  + Validate project details in MaxHire and SpringAhead for each consultant
    - Notify Office Manager if Estimated Hours, Bill Rate, and Pay Rate needs to be corrected
  + Enter PO#, if applicable to project, and billing address on the Job record > Placements tab > Billing tab > Billing Instructions field
  + Allocate project hours: [Sample 1](http://dasheinfo.pbworks.com/w/file/31720353/Resource_planner_tracker_sample.xlsx), [Sample 2](http://dasheinfo.pbworks.com/w/file/62734555/RailCar%20and%20IM%20%20Allocated%20Hours.xlsx)
  + Schedule and prepare for [Team Kick-Off and Client Kick-Off](http://dasheinfo.pbworks.com/w/page/37260572/Project%20Planning%20and%20Kick-Off)
* ***Project Manager*:**Create [project management tools](http://dasheinfo.pbworks.com/w/page/37260572/Project%20Management%20Tools) and submit to Engagement Manager for review and approval
* ***Engagement Manager:*** Review and approve project management tools
* ***Engagement Manager and Project Manager*:**Co-lead project kick-off meetings for the team and the client
* ***Project Manager:*** Write Project Strategy ([DRAFT template](http://dasheinfo.pbworks.com/w/file/62988535/Training_Strategy_Template.docx)) document and submit to Engagement Manager for review and approval
* ***Engagement Manager:***Review and approve Project Strategy
* ***Project Manager:*** Provide Project Strategy to client and obtain approval and sign-off
* ***Engagement Manager:***Call client within 1 week of project start-up to check in on client experience / satisfaction

**Manage Project: Monitor, Control, Track, and Report (Key metrics: mid-project surveys sent, mid-project survey scores, project updates sent)**

* ***Project Manager*:**
  + Monitor and control project scope, resources, and schedule using the project management tools
  + Report progress to client and Engagement Manager via weekly client status report (what's been done, what will be done, issues, resolutions) via meeting or email
  + Ensure the timeliness and quality of project deliverables
  + Escalate issues to the Engagement Manager
* ***Project Team Members*:** Design and develop deliverables [DRAFT Deliverable Development Process](http://dasheinfo.pbworks.com/w/page/56776293/DRAFT%20Deliverable%20Development%20Process)
* ***Engagement Manager or Internal Project Manager*:**
  + Manage project budget via project hours and cost tracker and provide status report [update](http://dasheinfo.pbworks.com/w/file/62734724/Status%20Report.docx) (key milestone % done, issues and action plan, project budget vs invoiced to date summary) to client with invoicing
  + Ensure accurate and timely invoicing
  + Hold solution preview meeting for SMEs/Core Team
* ***Engagement Manager***  
  + Handle issues escalated by Project Manager, project team members, and client
* ***Engagement Manager:***Call client monthly to check in on client experience / satisfaction
* ***Engagement Manager:***Schedule mid-project lunch/coffee with client and Dashe salesperson
* ***Engagement Manager:*** Send mid-project [Client Satisfaction Survey](http://dasheinfo.pbworks.com/w/page/40078174/Survey%20Process) and ensure that client completes the survey

**Close Project (Key metrics: profit margin met, post-project surveys sent, post-project survey scores, deliverables and samples filed)**

* ***Project Manager*:**
  + Ensure deliverables are handed off to client and to Dashe
  + Ensure consultants complete project survey- <http://dasheinfo.pbworks.com/w/page/40078174/Survey%20Process>
  + Complete [project retrospective](http://dasheinfo.pbworks.com/w/file/39032610/Lessons%20Learned-Project%20Post%20Mortem%20Template.dotx), and give to Engagement Manager for the client debrief
  + Plan and host project completion recognition/celebration, get approval from Engagement Manager
* ***Engagement Manager or Internal Project Manager*:**
  + Ensure final billing is submitted to client
  + Update the job and consultant(s) on the whiteboard to close the project
  + Update the Candidate record > Main Detail tab
    - Update Candidate Status on Candidate Profile tab
    - Update Available To Start on Candidate Profile tab
    - Enter Exit Date under Employment History Details on the Work Profile tab
    - Update Ranking on User-Defined Fields tab, if necessary
  + Move final files to deliverables storage folder and clear out project content repository (e.g., Dropbox)
  + Evaluate deliverables for eligibility as samples; add samples to sample library
  + Notify Sales Manager of project close
  + Once final billing has been sent and payments have been received, archive the consultants in SpringAhead unless they are moving on to another D&T project
* ***Engagement Manager*:**
  + Conduct a [project debrief](http://dasheinfo.pbworks.com/project%20debrief%20agenda)with client / send project close packet, including recommendations for additional work
  + Send client a [Project Close Survey](http://dasheinfo.pbworks.com/w/page/40078174/Survey%20Process), and ensure client completes the survey
    - Follow up with email twice and then call within 30 days, if no response to the emails
* ***Sales Manager*:**
  + Request testimonials and ask about award submissions, PR, news stories, etc.
  + Request samples from the team and identify potential testimonials.
  + Ask client to grant required permissions to show and/or share project samples/demos.
  + Schedule a lunch/coffee meeting for one month after project completion

**Report Ops Metrics**

* ***Engagement Manager*:** Report weekly project team, client, and project metrics to Ops manager by end of day Friday each week
* ***Ops manager:*** Enter weekly ops metrics in company scorecard by Monday noon each week