**Project Brief**

Please complete the following sections with information regarding the upcoming engagement. Once complete, this document is to be distributed to new project team members.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Customer Details** | | | | | |
| **Customer Name:**  [Example: ACME Inc.] | | | **Contact Name:** | | [Customer Name] |
| **Phone:** | | [Customer Phone number] |
| **E-Mail:** | | [Customer Email] |
| **Physical Engagement Address** (where engagement will transpire) | | | 12345 ACME Lane, Phoenix, AZ 22222 | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Account Team Details** | | | |
| **Role:** | **Contact Name:** | **Phone:** | **E-Mail:** |
| TSM |  |  |  |
| CM |  |  |  |
| Sales/Acct Rep. |  |  |  |
| Solution Arch. |  |  |  |
| TAM |  |  |  |
| CSM |  |  |  |
| Practice Lead |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **PROJECT GOALS** | | | | | |
| **Describe the goals and objectives that need to be accomplished by the end of the project.** | | | | | |
|  | | | | | |
| **What are the Customer’s pain points that need to be addressed?** | | | | | |
|  | | | | | |
| **What are the challenges that may impact the team’s performance?** | | | | | |
|  | | | | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Project Details --** *Example: Task delivered on site Monday-Thursday, 9-hour days; documentation performed remotely Friday(s).* | | | | | |
| **Project Manager(s)** | |  | | **Phone** |  |
| **Scope Summary** | |  | | | |
| **Current Operating Environment** | | [In your description, please include hardware (quantity, vendor, architecture), current operations systems (vendor, version), storage, middleware (vendor, version) deployment/ provisioning process, management infrastructure, etc.] | | | |
| **Project Dates** | | Start Date – End Date | | | |
| **Project Duration** | | [# of hours or months] | | | |
| **Work Hours** | | [Mon-Thur 8:00-6:00; Fri working remote remaining hours] | | | |
| **PTO/Training Policy** | | [Must notify PM 6 weeks in advance for approval] | | | |
| **T&E Policy** | | [$50 per day; actual charges; require all receipts] | | | |
| [Add Policy/Topic] | |  | | | |
| [Add Policy/Topic] | |  | | | |
| [Add Policy/Topic] | |  | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Site Specifics -- Contact for directions, facility entry, etc.** | | | |
| **Primary Name** |  | **Phone** |  |
| **Secondary Name** |  | **Phone** |  |
| **List facility access requirements needed by consultant**(i.e. parking pass, sign-in procedures, photo ID, etc.) | **[Example]** Consultant will need to register at information desk and is required to bring two (2) forms of Government issued ID. Consultant will be issued temporary parking badge and visitor ID for duration of engagement. | | |
| **Dress Code** |  | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **TRAVEL RECOMMENDATIONS** | | | |
| List preferred / nearest airports / train stations: | | | |
| **Airport Option 1** |  | **Airport option 2** |  |
| **Train** |  | | |
| Preferred / nearest hotels to location | | Discount Code | Distance to Office/Facility |
| **Hotel** |  |  |  |
| **Hotel** |  |  |  |
| **Hotel** |  |  |  |