**Names of Phases**

**Customer**

Project

Planning

Feedback

Project

Implementation

Partner

Selection

**Partner**

Project

Proposal

Feedback

Project

Implementation

Contract Finalization

**Partner Selection Phase**

1. Customer should know they can select any of the 3 and can reach out to us if none of the 3 work out (allow an option to communicate to their consultant through their dashboard)
2. Customer engages with 1 or more of the recommended partners through Messages, Voice or Video Chat, Phone Calls or F2F Meetings
   1. Platform should be able to enable some of above
   2. Customer should know what process will happen after he selects a Partner, so that he knows the value of completing the deal on Benchkart
      1. Should they know that our margins are in low single digits?no
      2. Low Advance to begin, Free Trial, Free replacement, collaboration tool, Account Manager, Ratings & Review
   3. There should be automated reminders for Selecting Vendor, if not done
      1. Once shortlist is there on their dashboard
      2. Within 72 hours
      3. Within 1 week
      4. Warning that the Vendor will be communicated that the project is not going thru, within 12 days (action required within 72 hours)
         1. How to enable extension
      5. Communication that Project is not active at end of 16 days
      6. In all cases, there should be an option of reaching out to BK Consultant from their dashboard, link can be there in email.
3. If customer wants, he can close project, by providing reason [Project Cancelled, Project Delayed, Project Pricing, Outsourced outside Benchkart, Other Reason]
   1. Message should go to all 3 recommended partners with the reason
4. In case the Partner wants to back out, he can do so by providing reason [Project Scope Change/Clarity, Not interested in working with this Customer, Other Workload, Other Reason]
   1. Message should go to the customer with the reason
5. Once Customer selects the Partner,
   1. Message will go with request to respond within 24 hours
6. Partner will upload
   1. Milestone Template [Excel Format already discussed, Akshay to finalize]
   2. Signed Contract (only if required)
   3. Raise the first invoice for “first fortnight”*[Min 10%].. this would be a performa invoice and we would term this as security.* 
      1. If Partner does not respond within 72 hours, Customer can select another partner. We issue 1/3 warning to Partner before termination.
7. Customer Approves the Milestone, Contract & Invoice
8. Customer Makes the Payment
   1. Invoice attached + details in a field which is specified by Payment Gateway
   2. Payment Visibility to both Partner & Customer
9. Work Begins
10. Collaboration option to be always between Partner & Customer

**Project Implementation Phase**

1. Collaboration Tool
2. Change Request Tool [ Please capture only what has impact on time-lines or Project value]

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Date for Change Request** | **Nature of Change Request** | **Description of Change Request** | **Document Upload option** | **Approval by Customer** | **Date of Approval** | **Revised Project End Date** | **Revised Project Value** |
| Date Field | [Multiple Selection]  Project Timeline  Project Scope  Project Value | e.g. Milestone is revised, |  |  |  |  |  |

1. Invoicing tool for invoice raised By Partner
   1. Amount & Tax Details [as per mandated by payment gateway]
   2. Description of the Invoice [e.g. Milestone 1 Advance funding]
   3. ORDER ID, partner ID or similar which should carry the unique identifier for each project.
   4. Payable by [e.g. within 3 days of invoice]
   5. Payable to [Benchkart Services Pvt Ltd]
   6. Customer to be allowed to change amount (in case they have to deduct TDS) &Pay Benchkart
   7. Customer will use the payment gateway to release the payment . We will need the order ID and the PARTNER ID with the payment
   8. Partner tool to allow cancellation of invoice/ in case made in error or if there is a different discussion with customer
2. Approval tool for Milestone completion & payment release
   1. Partner to request Customer to release payment
      1. Amount & Tax Details [as per mandated by payment gateway]
   2. Benchkart to release on approval by Customer | Customer to release
   3. Description of the Invoice [e.g. Milestone 1 Completion]
   4. Payable by [e.g. within 3 days of invoice]
   5. If customer does not approve in 7 days, it is auto-approved | Akshay to suggest
   6. If customer/Partner wish, it goes into dispute
3. Customer Review Optional [monthly email reminder]
   1. Project Progress Satisfaction [on a scale of 1 to 5, with 5 being highly satisfied]

**Feedback - Customer**

**#1| How was your overall experience?**

**Partner XYZ** 1 2 3 4 5

**Comments**

**Benchkart** 1 2 3 4 5

**Comments**

**#2| Which Services would you like us to add to our portfolio?**

**#3| We are in early stages of our growth & would love to get some referrals! Can you provide some clients for us to reach out to**

|  |  |  |
| --- | --- | --- |
| Person | Company | Email/Phone |
|  |  |  |
|  |  |  |
|  |  |  |

Can we take your reference when we reach out to them? []Y [ ]N

**#4| Would you like any of your existingPartners to be a part of the Benchkart? This will help you get a comprehensive view on all your future projects on Benchkart.**

|  |  |  |
| --- | --- | --- |
| Person | Company | Email/Phone |
|  |  |  |
|  |  |  |
|  |  |  |

**Feedback - Partner**

**#1| How was your overall experience?**

**Customer XYZ** 1 2 3 4 5

**Comments**

**Benchkart** 1 2 3 4 5

**Comments**