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| Pre-Award & BKO checklist V1.1 | |
| Project Name | Call Based Lead Generation System |
| If MP(provide original url)/ if Direct(attach original mail trail). Confirm, if CSA approved by VP Ops? If MP, is work view activated? | <https://www.elance.com/j/cloud-based-phone-system-built-affiliate-network/72805670> |
| Corporate Name/Client Name | MJ Ventures, LLC/ Jason Bennett |
| From City/State/Country | Spanish Fort, Alabama, US |
| Reviewer Name (s) |  |
| Review Date (s) |  |

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| ID | Items to be considered | Reviewer Column (Y/N/NA, if yes, give details in separate sheet of paper- wherever applicable) |
| 1 | Project Vision/ Charter, Core functionality/ challenge 1,2 & 3 (add sheet if required) | SaaS-based application to provide independent directly accessible URL based white label application to registered lead generation networks. |
| 2 | Skillset availability and pricing w.r.t experience have been considered? | Yes |
| 3 | Any legal issues? Jurisdiction/Penalty/NDA/Non Compete –Any potential risk | No |
| 4 | Wireframes Done and approved along with estimates by customer? | Yes, provided by client |
| 5 | Prototype done or to be done? If done, approved along with estimates by customer? Prototype work paid and new development project added as repeat? | No |
| 6 | All previously shared documents/references/diagrams etc are compiled. | Yes |
| 7 | Is there any design mockup that is to be used as a reference? Any PSD provided | No |
| 8 | - Use cases (basic flow, alternate flow and exceptional flow - define)  - UI Screen docs (wherever applicable)  - Business Rules And/OR Algorithm docs submitted?  Share details | Provided by client |
| 9 | Code Reusability? If yes, give details about components used from repository | No |
| 10 | Any freebies or specific commitments (4 dev. aligned from start, or free PM, QA etc) | No |
| 11 | Client Communication – SPOC, Team, time zone | EST, Client communication attached |
| 12 | Project Technical Approach – Application design | - |
| 13 | Business terms and team updated on the bidding site – Work View activated? | Yes, Milestone based so work view not required |
| 14 | Project Team- skill set, availability, planned leaves- Disclosure Form | Yes, MEAN |
| 15 | Tools for internal and external issue tracking decided and conveyed to customer | Basecamp |
| 16 | Estimated Schedule/timelines – known holidays, leaves | NA |
| 17 | Code re-usability: Have the components been decided from SDEI Forum, any other project? List the same. | NA |
| 18 | Assumptions/ dependencies/ technical constraints | Twilio API, NACHA, AWS |
| 19 | Support period and installations defined | No |
| 20 | Is the team using platform specific Framework provided by SDEI? If no, why - explain? | No, Application is in MEAN stack. |
| 21 | Minutes of meetings of previous communications, shared with team? | Compiled and shared as a separate document |
| 22 | Which tools/components are referenced during pre-sales discussions? List the same. | Skype, Elance PMB, Emails |
| 23 | Which other software/internal project referred during pre-sales discussions. Specific functionalities, which are referred? List the same. | Metzrail, CallMarketplace.com |
| 24 | Have we taken any assistance/reference from SDEI Forum or SDEI engineer in any form in relation to functionalities of the application? Please identify the sources. | No |
| 25 | Any functionality, which are yet to be decided? Are their any assumptions presumed for certain functionalities as per our experience? | No |
| 26 | Are there any RnD items, which we have committed but not implemented earlier in our SDEI experience? Is there any missing information, which can lead to delay? | NACHA.  No |
| 27 | Rate Revisions clause implemented in SOW? | No |
| 28 | QA added? If yes, paid or unpaid? | No |

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|  | Supplement Sheet for Man Month and Maintenance Projects |  |
| ID | Items to be considered | Reviewer Column (Y/N/NA, if yes, give details in separate sheet of paper- wherever applicable) |
| 1. | Define deliverables & frequency: clearly define the deliverables items and its frequency (weekly/fortnightly/monthly) |  |
| **1A** | If 1, is Yes, has release processes explicitly mentioned in the business term/contract and agreed upon by customer? |  |
| 1B | if 1, is No, then payment against developer time will be the criterion for developer’s performance explicitly mentioned in the business terms/contract and agreed upon by customer? |  |
| 2 | In either case, the process of acceptance through a monthly sign off against the work delivered via PI to be the criterion has been explained and explicitly mentioned in the business terms/contract and agreed by the customer? |  |
| 3 | Any variation from above or exceptions to be above to be explained in writing. |  |
| 4 | Code being worked upon remotely? |  |
| 5 | What frequency the code needs to be delivered? |  |
| 6 | Any other points missed? |  |

**Ref Docs: Proposal/SOW/PSD/Wireframe/Prototype/UseCase/UI Screen document/Business Rules**