	Team	Activity	Systems
Create Opportunity	Sales	Sales Team Creates an Opportunity in Connect Wise	Connect Wise
Convert to Sales Order	Sales	Operation converts won opportunities are converts it to a Sales Order	Connect Wise
Create Project Template	Operations	Operation converts the Sales order to a Project in Connect Wise	Connect Wise
Contact Client	Services / (I believe this could be operations, Paige?)	Services contact client to acknowlege opportunity and advise of process (This could be automated by Operations / For bigger projects Saje can contact them) - Sales provides contact name, project high level summary	Email or In person for > 100K projects
Assign PM	Services - PMO	Services assign project manager	Project Manager Capacity Sheet
Create Team Site	Services - PMO	Services creates Team channel for Project under client site Project channel contains templates for project management and checklist for different phases of the engagement	Teams
Initiation	Services – PMO & Project Team	Project Manager and Sales Handover Project Manager and Practice define team Internal Kick off Pre Client Kick off Client Kick off	MS Project, Teams, Connect Wise
Planning	Services – PMO & Project Team	Gather Requirements Create WBS Schedule Resources Highlight RAID Refine SoW Refine Project Plan Commitment and Acceptance of Requirements	MS Project Workshop Templates in Teams User Stories in Jira / Azure DevOps Connect Wise
Execution	Services – PMO & Project Team	Build the various aspects of a solution in accordance with Plan Track deliverables, such as designs, plans, schedules, and requirements and maintain: Release Notes Test Results Source Code Project Documentation	Ms Project Dev Ops / Jira Connect
Closure	Services – PMO & Project Team	Customer Acceptance Project Close out & Support Planning Performance Review Lessons Learnt IP Session	Teams Connect Wise Dev Ops /Jira
Lessons Learnt	Services – PMO & Practice	What Went Well & What Didn't IP? Celebrate Success	Teams at Project Level SharePoint at Offering / Solution Level
Support	Services / Managed Services	TBD	Support Tickets in Connect Wise
Customer Satisfaction	Operations \ Sales	Operations sends Customer Satisfaction survey	Forms
Project Based Performance	Operations	Operations conducts review on project with practice and PMO team	Forms?
Case Study	Marketing	Marketing Compiles a Case Study on the project	?
Support	Services \ Managed Services	Ensure support continues in a seamless fashion from one agreement to the next Monthly Report showing the calls managed during the period and including those opened and closed over the period	Connect Wise
Human Resource	Operations	Recruitment Staff Assessments and Training WH&S Payroll including Reimbursements	Connect Wise Bamboo HR Xero
Finance / ODS	Operations	Invoicing Purchasing Financial Report	Connect Wise Xero

Time Sheets in Connectwise

Project Collaboration in Teams

Control and Governance

Team

Services

Action:

Stakeholder management through routine project status meeting

Provide Budget update to client

Routine meeting with Team to highlight risks and mitigation plans

Identify opportunities

Apply technical governance process

Systems

Connect Wise
Ms Project
Teams