SOP Subject	Client Projects	Authorized By	Ken Fong
Category	Standard Operating Procedures	Status	Draft
Version	1.0	Effective Date	
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Introduction	
Purpose	Provide consistency in performance and quality in ResQSoft client engagements
Personnel Concerned	All ResQSoft staff and consultants
Directives Cancelled	None
Distribution	Email and SharePoint
Originator	ResQSoft Project Management Office

Revision History		
1.0		

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1.0 Standard Operating Procedure Summary: Client Projects

- PMO Project Control Documents and SOPs must be used for client projects exceeding one staff month of effort.
- For client engagements not to exceed one staff month of effort, only Section 2.4's Task and Issue Tracking SOP must be followed.
- When Project Control Documents and SOPs are required, any deviation from policy must be requested in writing to the PMO and approved prior to any such deviation occurring.
- Efforts expended on client projects shall be charged against the appropriate client and matter code in both timesheets and Scarab tasks.

2.0 Standard Procedures

2.1 General Procedures

The goal of the ResQSoft Project Management Office is to facilitate efficient and effective client engagements without adding undue overhead or burden to project teams and team members. As a guideline, for each client engagement that involves development resources as the primary revenue source (as compared with product licensing sales where the anticipated development labor is less than one man-month), the following should be used as Project Control Documents / procedures:

1. Financial Model
2. Project Plan/WBS
3. Task and Issue Tracking (Scarab or SharePoint)
4. Periodic Project Management Status Reports
5. Risk Management Plan and Project Risk Register
6. After Action Report and Analysis
7. At-Risk Work Authorization, if work will be done without a signed order

Whether Project Control Documents are required for client engagements depends upon the size and requirements of each specific client engagement. As the benchmark rule of thumb, any client engagement that is expected, as determined by the Business Development Estimation Model (BD Estimation Model), to require more than one staff month (e.g., developer man-month) of effort shall be deemed a PMO portfolio project that requires use of the Project Control Documents and PMO SOPs set forth herein.

Client projects that are not expected to exceed one staff month are not required to use Project Control Documents or adhere to PMO SOPs with exception of Task and Issue Tracking as set forth in Section 2.4 herein. At the project tech lead's discretion, Project Control Documents and additional SOPs may be used.

For projects estimated initially to require no more than one staff month but, during project execution, exceeds or is expected to exceed one staff month, PMO Control Documents and PMO SOPs shall apply moving forward from that point in time.

2.2 Project Financial Model

The responsible business development manager and project manager for each client engagement shall, with assistance provided as needed by the PMO, prepare a Project Financial Model using an approved template. The Project Financial Model shall, at a minimum, provide the following information:

1. The aggregate contact value and contract type
2. The period of performance
3. Expected resource allocations (from the WBS or project plan)
4. Budget line items, as applicable
5. Expected invoicing time frames (based on time and/or deliverable milestones)

The Project Financial Model template is attached to this Standard Operating Procedure for reference and is also available on the ResQSoft Internal Portal.

Project Financial
Model Template

2.3 Work Breakdown Structure/Project Plan

Each client engagement that is expected to require more than one staff month of developer resource time shall be accompanied by a Work Breakdown Structure(WBS)/Project Plan created using a SharePoint Task List, Microsoft Project or similar tool and submitted to the PMO along with the Project Financial Model. At a minimum, the WBS/Project Plan shall provide the following information:

1. Deliverables and time frames for delivery
2. Resource allocations for each deliverable
3. Deliverable and task interdependencies, if any
4. Major milestone dates/phase gates

WBS/Project Plans should take into account any company holidays (as defined in the Human Resources Policies and Procedures Manual) and known resource constraints for budgeting and estimating purposes.

For client engagements in legacy systems/applications modernization efforts, the attached Project Plan Template shall be used for all PMO portfolio projects.

Project Plan
Template (Legacy Mo

2.4 Task and Issue Tracking

All client project engagements, regardless of project size, shall use detailed Task and Issue Tracking to monitor project progress and maximize chances of project success. Currently, ResQSoft uses the Scarab tracking system for this purpose and the project manager, with support from the PMO, shall be responsible for ensuring the timeliness and accuracy of information in Scarab. This information shall be available for import (e.g., Microsoft Excel spreadsheet) into the ResQSoft Internal Portal's PMO section for preparation of management reports.

Tasking in Scarab shall be done in accordance with the Action Item Log – Internal SOP, attached hereto for reference and also available from the ResQSoft Internal Portal. Should parties external to ResQSoft (e.g., client representatives) require access to Scarab to task ResQSoft resources, client representatives should be given the Action Item Log – External Users SOP (External Tasking). This document should also be incorporated, at a minimum by reference, to any client engagement contract anticipating client tasking of ResQSoft resources.

Action Items - Internal Use

Action Items - External Tasking

It should be noted that the PMO does not require Task and Issue Tracking as outlined in this Section for client engagements that are not related to projects (e.g., staff augmentation or general consulting).

2.5 Project Management Status Reports

The responsible project manager shall, with assistance of the assigned technical lead as necessary, once per week on a day agreed upon by the project manager and PMO, submit a Project Management Status Report (to whom?) using the attached template. However, if the client requires submission of a Project Management Status Report using a different format, the PMO shall accept such report in lieu of using the attached template, so long as the report provides the following information at a minimum (otherwise the attached template shall be used):

1. Period of the report
2. Accomplishments for the preceding period
3. Planned activities for the upcoming period
4. Whether the project is on-schedule and on-budget
5. Any perceived issues jeopardizing ResQSoft's ability to stay on-schedule and on-budget with tasks and deliverables

Project Management Status Report Templa

For consulting arrangements covering specific ResQSoft resources on a staff augmentation or other non-ResQSoft project basis, the following status report template should be used.

Consulting Status Report Template

To avoid duplication of effort, if the applicable contract or task order requires creation or submission of a progress report to the client or end customer, progress reports shall be created in the format and on the schedule requested by the client, with a copy to the PMO. The PMO may, at its option, request additional status updates from the Project Manager as needed for its own management purposes, however.

2.6 Client Deliverables

Client deliverables shall be made in accordance with applicable contract documents (including the relevant task/purchase orders, statements/scope of work and other documents), including specification of any intellectual property restrictions. To ensure ResQSoft's intellectual property rights are protected, no deliverables shall be made to clients without prior PMO/Legal review of intellectual property rights restriction language.

Unless approved in writing by both the cognizant project manager and the PMO, the following delivery procedures shall be followed with the understanding that roles/responsibilities may be defined and specific tasks modified by the project manager to accommodate the needs of the specific project:

Client Delivery Procedures

2.7 Risk Management

It is a Standard Operating Procedure for the ResQSoft PMO, along with the project team for each client engagement, to identify and manage any perceived risks that may impact upon project success. For each client engagement that falls with PMO jurisdiction as a portfolio project, the responsible project manager shall, with the assistance of the PMO as needed, prepare a Project Risk Management Plan using the attached template.

Additionally, all project team members shall, as perceived risks are identified, complete and submit a Project Risk Form (template attached) to both the responsible project manager with copy to the PMO. The project manager and PMO shall be responsible jointly for updating the Project Risk Register (template attached) on a periodic basis no less often than semi-monthly.

It is incumbent upon the project manager and technical lead to ensure team developers understand the risk process and actively identify and report perceived risks using the Project Risk Form.

Risk Management Plan Template | Risk Management Process Template | Risk Register Template | Project Risk Form Template

2.8 After-Action Analysis

Each client engagement that is a PMO portfolio project shall, as part of project closure, include an After-Action Analysis, consisting of each team member filling out a Lessons Learned questionnaire and the PMO leading a Lessons Learned discussion meeting. The questionnaire (survey) shall focus on 8 core competencies:

1. Scope, Requirements, Objectives
2. Time/Schedule
3. Quality
4. Communications
5. Cost/Budget
6. Human Resources
7. Integration
8. Risk

The results of the analysis and meeting shall be compiled on a per-project basis and updated to the ResQSoft Internal Portal's PMO section, which shall keep a running average of project analysis scores. As part of the project closure process, the cognizant business development manager should also consider soliciting client feedback using a modified survey form tailored for the client engagement.

The standard template for Lessons Learned surveys is attached hereto and, upon organizational SharePoint roll-out, will be available online to be distributed on the ResQSoft Client Extranet with results compiled by the project manager and PMO.

Lessons Learned Survey Template

Results of the survey will be consolidated into an after-action analysis report by the PMO and delivered to the cognizant project manager and ResQSoft Management Team with recommendations for future projects/client engagements. This report may be shared with the project team at the discretion of the ResQSoft Management Team and project manager. Samples of After Action Analysis Reports may be obtained from the PMO.

2.9 At-Risk Work Authorization

As a pre-requisite to work start in earnest, ResQSoft Legal requires that the appropriate contract paperwork (subcontract, MSA, license, etc.) be finalized and executed. The project must also be quoted, and other procedures set forth in the Business Development SOP be followed. If it is determined by the cognizant project manager and business development manager that work should begin (ResQSoft resources tasked) on contract/SoW performance items prior to execution of the legal documents, the project manager shall complete the attached At-Risk Work Authorization Form for ResQSoft Management Team approval. At-risk work shall not begin absent unanimous consent of the ResQSoft Management Team and shall be limited to the scope requested, documented and authorized.

At-Risk Work
Authorization Templat

2.10 Project Cost Center

All staff (including consultant / subcontractor) efforts associated with the project shall be charged against the appropriate client and matter code in timesheets and Scarab Tasks. These codes are created and maintained by the ResQSoft PMO and created typically during the contract phase. Contact the PMO if the appropriate charge code(s) are missing.

3.0 Questions and Comments Relating to Client Projects

Any questions or comments relating to this SOP should be directed to the employee's or consultant's immediate supervisor or the ResQSoft PMO. Any deviations from policy must be requested and approved in writing by the ResQSoft PMO.

PMO Use Only

Status	Active SOP
Next Action	Quarterly Progress Review
Next Action Date	April 1, 2007