# Lead/Opportunity Process

Standard Lead	id Screen Info	Lead Qualification	Pre-Sale Engagement	Proposal	Decision ,≁roposal&Application Signed)	
Lead Origin WeblinkURL         Mailing Address Line 1         Mailing Address Line 2         Mailing Town         Mailing City         Mailing Postcode         Mailing Country ID         Mailing Country ID         Mailing Country IL         Mailing Region ID         Fax         Website Address         Do Not Contact         Organisation Name         IndustrySectorID:	Iutation In Lead Table) oduct adStatus adSource puntry agion build like this mandatory ganisationIndustrySector rganisationLegalStructureID	Existing Contact:       Link to Contact         Re-allocate:       Allow DP to allocate to a List         Staff Members/Licence       Holders drop down. This         Holders drop down. This       Field.         Should update the owner       Field.         field.       Should only allow         reallocation from country DP       to international.         to international.       IIPI should         be allowed to allocate to       other DP's and IIPI can         allocate to SA or Cyprus etc.       IIP NI and IDG also allow re-         allocation to a specialist too       P         We would like to re-allocate to the following:       Reallocated to: Owner         Reallocated to: Owner       Reallocated to: Manager         Qualify       Use the qualify button on the top bar and the drop down from there	New Account:       Link to Add Account         New Contact:       Link to Add Contact         Client Est Budget:       £xxx,xxx         Probability:       xxx%         Project Type:       Dropdown of         Lkup_ProjectType       Estimated Close Date:         By xx/xx/xx       Customer Need:       Text         Multinational:       Yes/No         (Default to NO)       Discussions         Discussions       Text         Product ID:       Ikup_product         Multiple Activities:       Ikup_activityegventtype's         LeadActivity       LeadActivity         Mail Merge button for Activities such as sending out infopack.       Would like the ability to add activities and possibly do mail merge for emails/documentation throughout lead process         Additional items required over and above Schema items Create Organisation         Lead Daily Rate       £xxx         IDG Don't use a daily rate per org as it is per project and differs dependent on project/product         Note Red items are mandatory	Application Form Sent Date: xx/xx/xx mandatory         Application Form:       Link to multiple         Proposal:       Link to multiple         Documents in case of       revisions         EMB Don't have Application form or Proposal for       Bus Review/Consultancy, so should not be         mandatory.       Proposal Sent Date: xx/xx/xx         IDG Have an email management system that should populate this field         Est Revenue:       £xxx,xxx GBP or EUR         Est Days:       xxx         Break down into Planning, On-site and reporting EMB Don't Break this down and they have ¼ days         IDG: Rev & Days are not recorded at the lead level as they are recorded on the project stage         Proposed Daily Rate       £xxx default to organisation daily rate and allow overwriting EMB have different rate per product and per project type. Would like tit to default to zero         Payment Currency       (Update organisation with this info too)         Put at end of sheet : Addition of Workflow to	Signed application Form received:       xx/xx/xx         Signed Application Form: Link to Document         EMB Don't use application forms unless it is an assessment.         DIG Don't use them         Other forms received:       'Other Forms' -not         mandatory         EMB & IDG Don't collect Staff lists or         organisational charts. There is also the issue of the DPA on this info.         Proposal Form Signed:       xx/xx/xx         DG have a Booking form instead of a Proposal         Estimated First Day on Site         Estimated Last Day on Site	<ul> <li>EMB Workshops</li> <li>Note: EMB have a lot of activity centred around workshop events. They process is that the lead is qualified as a good lead and then the customer is invited to a free workshop where much of the identification of needs is done.</li> <li>With a workshop, EMB need to know the know the date of attendance</li> <li>Following a workshop, they will often have a half day consultancy/Business review with the company. This is paid for and should be a project, however there is no quote, confirmation (Other than an email), no proposal, or scoping.</li> <li>Question: How is leadership and management consultancy represented. It is conulstancy as project type, but what about the product?</li> </ul>
Account Contact Client Est Budget: £xxx,xxx Est Revenue: £xxx,xxx Payment Currency: GBP/EUF	<	Schema Fields Populated on Creation of Lead	Schema Fields Populated on Qualification of L	chase emails and follow-up. Workflow to give task to chase up after 4 weeks to the person who develops the solution (or a stand in)		Schema Fields Populate on Disqualification of
reporting) Probability: xxx% Purchase Timeframe: By xx/xx/xx Project Type: Dropdow Estimated Close Date: By xx/xx/ Customer Need: Text Multinational: Yes/No Discussions Text Daily Rate Application Form Sent Date: xx/xx/ Application Form: Link to D Proposal: Link to m revisions Proposal Sent Date: xx/xx/xx Signed application Form: Link to D Other forms received: Staff List Organisa 'Other For	<pre>/xx /xx /xx /xx Document multiple Documents in case of</pre>	<ul> <li>Lead Table</li> <li>Record in Lead Table Created as Open         Lead Record: All Mandatory Fields filled in         Lead Status ID= Open         Lead Status Reason ID = New/Initial/Renewed         Contact             (Lookup to Lkup_LeadStatusReason Table)         Created Date = Todays date         Last Updated Date = Todays date         Lead Activity         Record in Lead Activity Table created         Lead Activity ReasonID = Initial/Renewed Contact??         (Lookup to Lkup_OrganisationStatusReason         Table)         Lead Status ID =Same as the change in Lead Status II         above         Date of Contact= Todays date         Last Updated Date = Todays date         Last Updated Date = Todays date         Lead Status ID =Same as the change in Lead Status II         above         Date of Contact= Today or before         Created Date = Todays date         Last Updated Date = Todays date         Note: The following fields are not required to be populated a         this stage         Organisation, Organisation Activity         A change will be required to the reports as the current Timec         Out Clients chart reports on organisations with status of Lead         Note: Should we not have the Lead.LeadStatusReasonID and         the LeadActivity.ActivityEventReasonID cross reference the         same look up table as opposed to         Lkup_LeadStatusReason Table         (Lkup_OrganisationStatusReason Table]</li> </ul>	Lead Table         • Record in Lead Table Updated         Lead Status ID changed to Qualified         Lead Status Reason ID = Any where Lead         on Lookup Table         (Lookup to Lkup_LeadStatusReason         Created Date = No Change         Last Updated Date = Todays         Lead Activity         • Record in Lead Activity Table created.         Lead Activity Record: All Mandatory Fi         ActivityEventReasonID = Client Fully In         (Lookup to Lkup_OrganisationStat Table)         Lead Status ID= Same as the change in         ID above         Date of Contact= Today or before         Created Date = Todays date         Last Updated Date = Todays date         Contact         • Record in Contact Table Created         Contactt         • Record in Organisation Table Created         Organisation         • Record in Organisation Table Created         Origin Lead ID = The Lead ID this prosport         Created from.	ad Status is 2         on Table)         ields filled in         informed??         tusReason         b. Lead Status         iilled in         iilled in         b. Lead Status         iilled in         b. Lead Status         b. Lead Status	ht Status Table created is Record: All Mandatory Fields filled in ct ays date or No more than 1 week previously i Fully Informed' nisationStatusReason Table) e ys date Movement Table created. ne as the change in organisation current status above eDate = Same as Status Change Date above Reason ID =Same as the Change Reason ID on the s above. nisationStatusReason Table) e Last Updated Date as Lead Table above y Table created. in ?? (Potentially remove this field. See Notes) nisationEventReason Table) BD = ??? (Potentially remove this field. See Notes) = Committed ReasonID =Same as the Change Reason ID on the Organisation nisationStatusReason Table) e = Blank = Blank = Blank	Lead         Lead Table         Record in Lead Table Updated         Lead Status ID changed to Dis-Qualified         Lead Status Reason ID = Not Interested         (Lookup to Lkup_LeadStatusReason         Table)         Created Date = No Change         Last Updated Date = Todays date         Lead Activity         • Record in Lead Activity Table created and.         Lead Activity Record: All Mandatory         Fields filled in         ActivityEventReasonID = Not Interested         (or an alternative)         (Lookup to         Lkup_OrganisationStatusReason         Table)         Lead Status ID = Same as the change in         Lead Status ID above         Date of Contact= Todays date         Last Updated Date = Todays date         Last Updated Date = Todays date

# Project Process - FTA

	Standard Project Screen Info	Context Discussion	Final Proposal	On Site	Outcome
and then 'oth No Revenue Days: Default to ze On-site and r Daily Rate Default to ze Total Revenue Default to ze Scoped Level Std/Bronze/S Translator required: Documents Sent:	xx/xx/xx (There is quite a complex method of calculating this dependant on the award, the product and previous project outcome. This should be calculated anyway for a dashboard and therefore this same calculation should show here and be view only) For IDG, this date sets all of the deadlines for reminder etc and a complex workflow. (New currency Field) al box top select multiple specialists. Need to be a lead specialist her specialists'. See the specialist table details proposal. ero and not from proposal figure. Break down into Planning, reporting. Defaulted to the proposal days and ability to overwrite. ero initially. Silver/Gold. Default to blank and non mandatory YES/NO Two PDF/Doc uploads:	Project TypeLkup_ProjectNo Revenue Days:Default to zero and not from proposal figure Break down into Planning, On-site and reporting.Daily RateDefault to automatically populate organisation and overwrite possible (Not for IDG)Total RevenueDefault to daily rate x revenue days and not over writable.Need to confirm in Gross or NetScoped LevelStd/Bronze/Silver/Gold. Not needed on consultancyPrimary DP Contact:Link to Contact. Not needed as mandatoryIDG have 3 contacts: Specialist, Client Services Advisor and Bus Dev ManagerProject Status:Default to "Blanks to force filling inLast Day on Site(Proj Outcome Decision Date):xx/xx/xxTotal Employees to be interviewedxxxxEMB: Employee Details not needed for ConsultancyIDG: Not needed at allTranslator required:YES/NO Default to blank to force it to be filled inEMB: Not neededEMB: Not neededEMB: Not neededEMB: and IDG: Not neededPlanning Meeting Date:xx/xx/xx	Documents Sent:Two PDF/Doc uploads: Confirmation Letter AgreementEMB: Not these documents but do have booking form and assessment plan. They use symphony to send the confirmation emails and it would be ideal to automatically upload from there.IDG Don't have these docsDate Documents Sentxx/xx/xx – one for each document sent.Ideally have the date uploaded rather than date sendDocument Received: Scanned Signed agreemnt Staff List & Org ChartNot Needed, but do need to upload many other docs such as confirmation email or booking form Date Agreement Received: xx/xx/xxMultiple Specialists:Drop down box to select multiple specialists. Need to be a lead specialist docs from specialist.Additional Items Required Specialist Docs Sent:Plan received from Specialist:xx/xx/xxPlan received from Specialist:xx/xx/xxPlan Sent for QA:xx/xx/xxPlan QA Approvedxx/xx/xxPlan QA but not mandatoryAssessor Uploads Plan Price Confirmation Email sent out at this point For Advisory/Consultancy, could upload anything	First Day on Site:       xx/xx/xx         Last Day on Site:       xx/xx/xx         (ProjectOutcomeDecisionDate)         EMB can have consultancy projects which are 10         days spread over 4 months and they need to         record which days these are and when they are         completed.         IDG do need the days and the activity on each         day to tick off         Number of People Surveyed: xxx         IIP Survey Type:       New Drop down list of:         Face To Face         40         9         27 Inicator fields:         9 Indicators x 3 Themes with 4 values.         Required to take from Web site.         Final Result: Calculation done on the 27 indicator         fields above/	Report Received:       Document scanned/ uploaded         Report received date:       xx/xx/xx         Reports are not used for Bus Review/Consultancy         Report Sent for QA:       xx/xx/xx         Report QA Approved       xx/xx/xx         QA fields are not needed to be mandatory as they only QA 10%         Should not be mandatory for IDG         Project Status Outcome       – auto filled in with option to overide         ProjectStatus – auto filled in and updated on award table       Award Level Auto filled in and updated on award table         Not for Advisory       Report Sent to client:       xx/xx/xx         Add: Invoiced Date       X
Date Documents Sent: Document Received: Date Agreement Received:: Specialist Docs Sent: Document: Plan received from Specialist: Report Received: Report received date: Evidence Fields: Report Sent to client: Activity Type Plan Sent for QA: Plan QA Approved Report Sent for QA:	Confirmation Letter Agreement xx/xx/xx – one for each document sent. Scanned Signed agreement xx/xx/xx vx/xx/xx Upload of Scanned plan or docx from specialist. xx/xx/xx Document scanned xx/xx/xx Matrix of results needs to show how we calculate the award from this. Bill to email format and how we enter assessed, not assessed, failed, passed, partially met Award is Met/Not Met on Scoped level. Different scored required for different scoped level. Can change depending on scoped level and product. Need to indicate if all fields filled in or not xx/xx/xx Lkup_ActivityEventType (Note: May need to review values) xx/xx/xx xx/xx/xx xx/xx/xx xx/xx/xx				

Note Red items are mandatory



# Project Process - Review

Standard Project Screen Info	Context Discussion	Final Proposal On Site	Outcome
Project Fields Required by Schema       (Autonumber)         Organisation ID       (Autonumber)         Product       Ikup_Product         PrimaryDeliveryCentreContact       Ikup_Contact – see Notes on Additional Tables         Project Number       (DP's Number not IIP - Autonumber??)         Priority       Ikup_Projectstatus         Project Status Outcome       Ikup_projectstatus         Project Status Outcome       Ikup_projectstatus         Project Closure Date       xx/xx/xx         Assessment Due Date       (There is quite a complex method of calculating this dependant on the award, the product and previous project outcome This should be calculated anyway for a dashboard and therefore this same calculation should show here and be view only)         Total Revenue Days       Total Revenue Currency Total Revenue Currency       (New currency Field)         Total Revenue Currency       (New currency Field)       Total Revenue Days:         Total Employees in Scope Total Employees interviewed       Drop down box top select multiple specialists. Need to be a lead specialist and then 'other specialists'. See the specialist table details proposal. No Revenue Days:       Default to zero and not from proposal figure. Break down into Planning, On-site and reporting. Defaulted to the proposal days and ability to overwrite.         Daily Rate       Default to zero initially       Std/Bronze/Silver/Gold. Default to blank and non mandatory Translator required:         YES/NO<	Daily RateDefault to automatically populate organisation and overwrite possible (Not for IDG)form and ass send the con to automatic IDG Don't ha Date Document se document se tideally have f sendTotal RevenueDefault to daily rate x revenue days and not over writable.form and ass send the con to automatic IDG Don't ha Date Document se tideally have f sende.Need to confirm in Gross or Net Scoped LevelStd/Bronze/Silver/Gold. Not needed on consultancy Not needed as mandatoryDocument se tideally have f sende.Primary DP Contact:Link to Contact. Not needed as mandatoryNot Needed, docs such as Date Agreem Multiple Specialist, Client Services Advisor and Bus Dev Manager Project Status:Not needed as multiple Specialist, Client Services Advisor and Bus Dev Managerø.Project Closure Date: runce filling inxx/xx/xx xx Total Employees to be interviewed force it to be filled in force it to be filled in force it to be filled inAdditional Ite Specialist. Plan act and IDG: Not needed Planning Meeting Date: 	Confirmation Letter AgreementLast Day on Site: xx/xx/xx (ProjectOutcomeDecisionDate)uese documents but do have booking sessment plan. They use symphony to onfirmation emails and it would be ideal cally upload from there. ave these docs meents Sent the date uploaded rather than dateEMB can have consultancy projects which are 1 days spread over 4 months and they need to record which days these are and when they are completed. IDG do need the days and the activity on each day to tick offNumber of People Surveyed: xxxIDG do need the days and the activity on each day to tick offNumber of People Surveyed: xxxIIP Survey Type:Number of People Surveyed: xxx40 927 Inicator fields: 9927 Inicator fields: 99 Indicators x 3 Themes with 4 values. Required to search and plan or docx from d from Specialist: xx/xx/xx s are not needed to be mandatory, but some reports A but not mandatory	<ul> <li>QA fields are not needed to be mandatory as they only QA 10%</li> <li>Should not be mandatory for IDG</li> <li>Project Status Outcome – auto filled in with option to overide</li> <li>ProjectStatus – auto filled in with option to override</li> <li>Award Level Auto filled in and updated on award table</li> <li>Not for Advisory</li> <li>Report Sent to client: xx/xx/xx</li> <li>Certificate Sent Date: xx/xx/xx</li> <li>Add: Invoiced Date</li> </ul>
Confirmation Letter AgreementDate Documents Sent:xx/xx/xx – one for each document sent.Document Received:Scanned Signed agreementDate Agreement Received::xx/xx/xxSpecialist Docs Sent:xx/xx/xxDocument:Upload of Scanned plan or docx from specialist.Plan received from Specialist:xx/xx/xxReport Received:Document scannedReport received date:xx/xx/xxEvidence Fields:Matrix of results needs to show how we calculate the award from this. Bill to email format and how we enter assessed, not assessed, failed, passed, partially met Award is Met/Not Met on Scoped level Different scoped level and product. Need to indicate if all field filled in or notReport Sent to client:xx/xx/xxActivity TypeLkup_ActivityEventType (Note: May need to review values)Plan Sent for QA:xx/xx/xxPlan QA Approvedxx/xx/xxReport Sent for QA:xx/xx/xxReport Sent for QA:xx/xx/xxSent for QA:xx/xx/xxReport QA Approvedxx/xx/xx <td></td> <td></td> <td></td>			



# Project Process - Advisory

Standard Project Screen Info		Context Discussion Final Proposal		On Site	Outcome
Project Fields Required by Schema Organisation ID Product PrimaryDeliveryCentreContact Project Number Priority Project Type ID Project Status Project Status Outcome First Day on Site: Last Day on Site (Project Outcome D Project Closure Date Assessment Due Date	(Autonumber) Ikup_Product Ikup_Contact – see Notes on Additional Tables (DP's Number not IIP - Autonumber??) Ikup_Priority Lkup_projectype Ikup_projectStatusOutcome xx/xx/xx xx/xx/xx (There is quite a complex method of calculating this dependant on the award, the product and previous project outcome. This should be calculated anyway for a dashboard and therefore this same calculation should show here and be view only) For IDG, this date sets all of the deadlines	Project Type       Lkup_Project         No Revenue Days:       Default to zero and not from proposal figure         Break down into Planning,       On-site and reporting.         Daily Rate       Default to automatically populate         organisation and overwrite possible (Not for IDG)       Default to daily rate x         Total Revenue       Default to daily rate x         Need to confirm in Gross or Net       REMOVE: Scoped Level Std/Bronze/Silver/Gold.         Not needed on consultancy       Primary DP Contact:         Link to Contact.       Not needed as mandatory         IDG have 3 contacts: Specialist, Client Services Advisor and Bus Dev Manager       Default to "Blanks to force filling in         Last Day on Site(Proj Outcome Decision Date):xx/xx/xx       Default to "Blanks.	Documents Sent:Two PDF/Doc uploads:KEEP:Confirmation LetterREMOVE:AgreementAdd:Alternative AgreementEMB: Not these documents but do have bookingform and assessment plan. They use symphony tosend the confirmation emails and it would be idealto automatically upload from there.IDG Don't have these docsAlter to reflct docs kept:Date Documents Sentxx/xx/xx – one for each documentsent.Ideally have the date uploaded rather than datesendDocument Received: Scanned SignedAlternative:agreemntNot Needed, but do need to upload many otherdocs such as confirmation email or booking formDate Agreement Received: xx/xx/xxMultiple Specialists:Drop down box to selectmultiple specialists.	First Day on Site:       xx/xx/xx         Last Day on Site:       xx/xx/xx         (ProjectOutcomeDecisionDate)         EMB can have consultancy projects which are 10         days spread over 4 months and they need to         record which days these are and when they are         completed.         IDG do need the days and the activity on each         day to tick off         Number of People Surveyed: xxx         IIP Survey Type:       New Drop down list of:         Face To Face       40         9       27 Inicator fields:         9 Indicators x 3 Themes with 4 values.	Non Mandatory (In case active plan): Report Received: Document scanned/uploaded Non Mandatory (In case active plan): Report received date: xx/xx/xx Reports are not used for Bus Review/Consultanc REMOVE?: Report Sent for QA: xx/xx/xx QA fields are not needed to be mandatory as they only QA 10% Should not be mandatory for IDG Project Status Outcome – auto filled in with option to overide ProjectStatus – auto filled in with option to override REMOVE: Award Level Auto filled in and updated on award table Not for Advisory REMOVE: Report Sent to client: xx/xx/xx Certificate Sent Date: xx/xx/xx
and then No Revenue Days: Default to On-site ar Daily Rate Default to Total Revenue Default to Scoped Level Std/Bronz	n box top select multiple specialists. Need to be a lead specialist other specialists'. See the specialist table details proposal. zero and not from proposal figure. Break down into Planning, d reporting. Defaulted to the proposal days and ability to overwrite. zero initially zero initially. e/Silver/Gold. Default to blank and non mandatory	Project Closure Date:       xx/xx/xx         REMOVE: Total Employees in Scope: xxxx         REMOVE:Total Employees to be interviewed         xxxx         EMB: Employee Details not needed for Consultancy         IDG: Not needed at all         Translator required:       YES/NO Default to blank to force it to be filled in         EMB: Not needed         EMB and IDG: Not needed         Planning Meeting Date:       xx/xx/xx	Need to be a lead specialist and then 'other specialists Additional Items Required Specialist Docs Sent: xx/xx/xx CHANGE:Document: Upload of Scanned plan or docx from specialist. REMOVE:Plan received from Specialist:xx/xx/xx REMOVE:Plan Sent for QA: xx/xx/xx REMOVE:Plan QA Approved xx/xx/xx Above items are not needed to be mandatory, but they do QA some reports IDG Does QA but not mandatory Assessor Uploads Plan Price Confirmation Email sent out at this point For Advisory/Consultancy, could upload anything	Required to take from Web site. Final Result: Calculation done on the 27 indicator fields above/	
Translator required: Documents Sent: Date Documents Sent: Document Received: Date Agreement Received:: Specialist Docs Sent: Document: Plan received from Specialist: Report Received: Report Received: Report received date: Evidence Fields: Report Sent to client: Activity Type	YES/NO Two PDF/Doc uploads: Confirmation Letter Agreement xx/xx/xx – one for each document sent. Scanned Signed agreement xx/xx/xx xx/xx/xx Upload of Scanned plan or docx from specialist. xx/xx/xx Document scanned xx/xx/xx Matrix of results needs to show how we calculate the award from this. Bill to email format and how we enter assessed, not assessed, failed, passed, partially met Award is Met/Not Met on Scoped level. Different scored required for different scoped level. Can change depending on scoped level and product. Need to indicate if all fields filled in or not xx/xx/xx Lkup_ActivityEventType (Note: May need to review values)				



# Project Process - Diagnostic

Standard Project Screen Info			Cont	ext Discussion	Fir	nal Proposal	On Site		Outcome		
Project Fields Required by Schema       (Autonumber)         Organisation ID       Ikup_Product         Product       Ikup_Contact – see Notes on Additional Tables         Project Number       (DP's Number not IIP - Autonumber??)         Project Type ID       Ikup_projecttype         Project Status Outcome       Ikup_projectstatus         Project Status Outcome       Ikup_projectStatusOutcome         First Day on Site:       xx/xx/xx         Assessment Due Date       (There is quite a complex method of calculating this dependant on the award, the product and previous project outcome. This should be calculated anyway for a dashboard and therefore this same calculation should show here and be view only)         For IDG, this date sets all of the deadlines for reminder etc and a complex workflow.         Total Revenue Days       Total Revenue Currency         Total Employees in Scope       Total Employees in Scope         Total Employees in terviewed       Scope		for IDG) Total Revenue Need to co Scoped Level Primary DP Contact: IDG have 3 contacts: Sp and Bus Dev Manager Project Status: Last Day on Site(Proj Ou Project Closure Date: Total Employees in Sco Total Employees to be i	on and overwrite possible (Not Default to daily rate x revenue days and not over writable. Onfirm in Gross or Net Std/Bronze/Silver/Gold. Not needed on consultancy Link to Contact. Not needed as mandatory becialist, Client Services Advisor Default to "Blanks to force filling in utcome Decision Date):xx/xx/xx xx/xx/xx pe: xxxx	form and assessment send the confirmation to automatically uploa IDG Don't have these Date Documents Sent document sent. Ideally have the date of send Document Received: S Not Needed, but do no docs such as confirma Date Agreement Rece Multiple Specialists:	docs xx/xx/xx – one for each uploaded rather than date Scanned Signed agreemnt Staff List & Org Chart eed to upload many other tion email or booking form ived: xx/xx/xx Drop down box to select multiple specialists. Need to be a lead specialist and then 'other specialists'	EMB can have consulta days spread over 4 mo record which days thes completed. IDG do need the days a day to tick off Number of People Surv IIP Survey Type: 27 Inicator fields: 9 Indicators x 3 Theme Required to take from	se are and when they are and the activity on each veyed: xxx New Drop down list of: Face To Face 40 9 s with 4 values.	Make Non Mandatory: xx/xx/xx Make Non Mandatory: xx/xx/xx QA fields are not needed only QA 10% Should not be mandato Project Status Outcomed option to overide ProjectStatus – auto fill override	Report QA Approved ed to be mandatory as they ary for IDG e – auto filled in with		
Project Fields Required by Multiple Specialists: No Revenue Days: Daily Rate Total Revenue	y Internatio Drop down and then 'o Default to z On-site and Default to z Default to z	box top select multiple sp ther specialists'. See the ero and not from proposa reporting. Defaulted to t	pecialists. Need to be a lead specialist specialist table details proposal. al figure. Break down into Planning, the proposal days and ability to overwrite. lank and non mandatory	EMB: Not needed EMB and IDG: Not need Planning Meeting Date	ded	specialist. Plan received from Sp Plan Sent for QA: Plan QA Approved Above items are not n they do QA some repo IDG Does QA but not n Assessor Uploads Plan Price Confirmation Em	ecialist: xx/xx/xx xx/xx/xx xx/xx/xx weeded to be mandatory, but orts mandatory				
Date Documents Sent: Document Received: Date Agreement Received Specialist Docs Sent: Document: Plan received from Specia Report Received: Report received date: Evidence Fields: Report Sent to client: Activity Type Plan Sent for QA: Plan QA Approved Report Sent for QA: Report QA Approved		x/xx/xx – one for each Scanned Signed agreem xx/xx/xx upload of Scanned plan xx/xx/xx Document scanned xx/xx/xx Matrix of results needs this. Bill to email format failed, passed, partially Different scored require	ent or docx from specialist. to show how we calculate the award from : and how we enter assessed, not assessed, met Award is Met/Not Met on Scoped level. ed for different scoped level. Can change vel and product. Need to indicate if all fields								



# Project Process - Interim

		Standard Project Screen	lofo	Con	text Discussion	Final	Proposal	On Site		Outcome
		Standard Hoject Screen	into	Con			Порозаг	On site		Outcome
Project Fields Required Organisation ID Product	by Schema		(Autonumber) lkup_Product	Project Type No Revenue Days:	Lkup_Project Default to zero and not from proposal figure	Need to clarify as expected centres Documents Sent:	Two PDF/Doc uploads:	First Day on Site: Last Day on Site: (ProjectC	xx/xx/xx xx/xx/xx vutcomeDecisionDate)	Non Mandatory (In case active plan): Report Received: Document scanned/uploaded Non Mandatory (In case active plan):: Report
PrimaryDeliveryCentreCo	ontact		<pre>lkup_Contact – see Notes on Additional Tables</pre>		Break down into Planning, On-site and reporting.	REMOVE: REMOVE:	Confirmation Letter Agreement			received date: xx/xx/xx Reports are not used for Bus Review/Consultancy
Project Number Priority Project Type ID			(DP's Number not IIP - Autonumber??) Ikup_Priority Lkup_projectype	organisat for IDG)	o automatically populate ion and overwrite possible (Not	Need to keep email corr Need to clarify as expect centres	ted to vary between	days spread over 4 mc record which days the	ancy projects which are 10 onths and they need to se are and when they are	REMOVE?:         Report Sent for QA:         xx/xx/xx           REMOVE?:         Report QA Approved         xx/xx/xx           QA fields are not needed to be mandatory as         XX
Project Status Project Status Outcome First Day on Site:	_		Ikup_projectstatus Ikup_ProjectStatusOutcome xx/xx/xx	Total Revenue	Default to daily rate x revenue days and not over writable.	form and assessment pla send the confirmation en	nts but do have booking an. They use symphony to mails and it would be ideal	completed. IDG do need the days day to tick off	and the activity on each	they only QA 10% Should not be mandatory for IDG
Last Day on Site (Project Project Closure Date Assessment Due Date	: Outcome Dec	isionDate)	xx/xx/xx xx/xx/xx (There is quite a complex method of	REMOVE: Scoped Leve	confirm in Gross or Net Std/Bronze/Silver/Gold. Not needed on consultancy	to automatically upload IDG Don't have these do Alter to reflct docs kept	cs :Date Documents Sent			Project Status Outcome – auto filled in with option to overide ProjectStatus – auto filled in with option to
			calculating this dependant on the award, the product and previous project outcome. This should be calculated anyway for a dashboard and therefore this same calculation should show here and be view	Primary DP Contact: IDG have 3 contacts: S and Bus Dev Manager Project Status:	Link to Contact. Not needed as mandatory pecialist, Client Services Advisor Default to "Blanks to force	sent. Ideally have the date up send Document Received: Sca		Number of People Sur	veyed: xxx New Drop down list of: Face To Face 40	override <b>REMOVE:</b> Award Level Auto filled in and updated on award table Not for Advisory <b>REMOVE:</b> Report Sent to client: xx/xx/xx
Total Revenue Days Total Revenue			only) For IDG, this date sets all of the deadlines for reminder etc and a complex workflow.	Last Day on Site(Proj C Project Closure Date: REMOVE: Total Emplo REMOVE:Total Employ		alternative:agreemnt Not Needed, but do nee docs such as confirmatic Date Agreement Receive Multiple Specialists:	n email or booking form	27 Inicator fields: 9 Indicators x 3 Theme Required to take from		Certificate Sent Date: xx/xx/xx Add: Invoiced Date
Total Revenue Currency Total Costs Total Employees in Scop Total Employees intervie			(New currency Field)	XXXX	s not needed for Consultancy YES/NO Default to blank to	Multiple Specialists.	multiple specialists. Need to be a lead specialist and then 'other specialists	Final Result: Calculation fields above/	on done on the 27 indicator	
Project Fields Required	by Internatio	nal		EMB: Not needed	force it to be filled in	Additional Items Require Specialist Docs Sent:	xx/xx/xx			
Multiple Specialists: No Revenue Days: Daily Rate Total Revenue Scoped Level Translator required:	and then 'of Default to z On-site and Default to z Default to z	her specialists'. See the s ero and not from proposal reporting. Defaulted to the ero initially	ecialists. Need to be a lead specialist pecialist table details proposal. I figure. Break down into Planning, ne proposal days and ability to overwrite. ank and non mandatory	EMB and IDG: Not nee Planning Meeting Date		they do QA some report IDG Does QA but not ma Assessor Uploads Plan	rom Specialist:xx/xx/xx tA: xx/xx/xx ved xx/xx/xx ded to be mandatory, but s ndatory			
Documents Sent:		Two PDF/Doc uploads: Confirmation Letter Agreement				Price Confirmation Emai For Advisory/Consultanc	y, could upload anything			
Date Documents Sent: Document Received: Date Agreement Receive	ed::	xx/xx/xx – one for each c Scanned Signed agreeme xx/xx/xx								
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Report Sent to client: Activity Type Plan Sent for QA: Plan QA Approved Report Sent for QA: Report QA Approved		xx/xx/xx Lkup_ActivityEventType to review values) xx/xx/xx xx/xx/xx xx/xx/xx xx/xx/xx xx/xx/	(Note: May need							



# Project Process – Strategic Review

Standard Project Screen Info				Context Discussion Final Proposal		On Site		Outcome			
Project Fields Required Organisation ID ProductPrimaryDeliveryCentredProject Number Priority Project StatusProject Status Project Status Outcome First Day on Site: Last Day on Site (Project Project Closure Date Assessment Due DateTotal Revenue Days Total Revenue Currency Total Costs Total Employees in Scop Total Employees intervitProject Fields Required Multiple Specialists: No Revenue Days: Daily Rate Total Revenue Scoped Level Translator required:	Contact e ct Outcome De ct Outcome De d by Internatio Drop down and then 'o Default to z On-site and Default to z Default to z	xx/xx/xx (There is quite a comp calculating this depend the product and previo This should be calculat dashboard and therefor calculation should shor only) For IDG, this date sets for reminder etc and a (New currency Field) hall box top select multiple specialists. Need to be a le ther specialists'. See the specialist table details pre ero and not from proposal figure. Break down into reporting. Defaulted to the proposal days and abi	tes on Additional Autonumber??) Da come Sco lex method of dant on the award, bus project outcome. ed anyway for a ore this same w here and be view all of the deadlines complex workflow. Pro Toi Toi EN ad specialist oposal. Planning, ility to overwrite.	organisation for IDG) otal Revenue Need to con coped Level rimary DP Contact: DG have 3 contacts: Spe nd Bus Dev Manager roject Status: ast Day on Site(Proj Out roject Closure Date: otal Employees in Scope otal Employees to be im	terviewed xxxx not needed for Consultancy YES/NO Default to blank to force it to be filled in	form and assessment send the confirmation to automatically uplot IDG Don't have these Date Documents Sent document sent. Ideally have the date send Document Received: 1 Not Needed, but do n docs such as confirma Date Agreement Rece Multiple Specialists: Additional Items Requ Specialist Docs Sent: Document: Upload of specialist. Plan received from Sp Plan Sent for QA: Plan QA Approved Above items are not r they do QA some repu IDG Does QA but not Assessor Uploads Plar Price Confirmation En	docs xx/xx/xx – one for each uploaded rather than date Scanned Signed agreemnt Staff List & Org Chart beed to upload many other etion email or booking form eived: xx/xx/xx Drop down box to select multiple specialists. Need to be a lead specialist and then 'other specialists' uired xx/xx/xx Scanned plan or docx from pecialist: xx/xx/xx xx/xx/xx beeded to be mandatory, but orts mandatory	EMB can have consultan days spread over 4 mont record which days these completed. IDG do need the days an day to tick off Number of People Surve IIP Survey Type: 27 Inicator fields: 9 Indicators x 3 Themes Required to take from W	ths and they need to e are and when they are ad the activity on each eyed: xxx New Drop down list of: Face To Face 40 9 with 4 values.	Report Sent for QA: Report QA Approved QA fields are not neede only QA 10% Should not be mandato Project Status Outcome option to overide ProjectStatus – auto fill override	– auto filled in with
Documents Sent: Date Documents Sent: Document Received: Date Agreement Received: Date Agreement Received: Specialist Docs Sent: Document: Plan received from Spec Report Received: Report Received: Report Received date: Evidence Fields: Report Sent to client: Activity Type Plan Sent for QA: Plan QA Approved Report Sent for QA: Report Sent for QA: Report QA Approved	ved::	Two PDF/Doc uploads: Confirmation Letter Agreement xx/xx/xx – one for each document sent. Scanned Signed agreement xx/xx/xx xx/xx/xx Upload of Scanned plan or docx from specialist. xx/xx/xx Document scanned xx/xx/xx Matrix of results needs to show how we calculate this. Bill to email format and how we enter asses failed, passed, partially met Award is Met/Not M Different scored required for different scoped level depending on scoped level and product. Need to filled in or not xx/xx/xx Lkup_ActivityEventType (Note: May need to review values) xx/xx/xx xx/xx/xx xx/xx/xx xx/xx/xx	sed, not assessed, et on Scoped level. vel. Can change								



## **Project Process – Continued Assessment, Retaining** Recognition, Top Up

Standard Project Screen Info			Context Discussion Final Proposal		On Site	Outcome	
Project Fields Required Organisation ID Product PrimaryDeliveryCentreC Project Number Project Type ID Project Status Project Status Outcome First Day on Site: Last Day on Site (Project Project Closure Date Assessment Due Date	Contact	(Autonumber) Ikup_Product Ikup_Contact – see Notes on Additional Tables (DP's Number not IIP - Autonumber??) Ikup_Priority Lkup_projectype Ikup_projectstatus Ikup_ProjectStatusOutcome xx/xx/xx xx/xx/xx (There is quite a complex method of calculating this dependant on the award, the product and previous project outcome. This should be calculated anyway for a dashboard and therefore this same	Project Type       Lkup_Project         No Revenue Days:       Default to zero and not from proposal figure Break down into Planning, On-site and reporting.         Daily Rate       Default to automatically populate organisation and overwrite possible (Not for IDG)         Total Revenue       Default to daily rate x revenue days and not over writable.         Need to confirm in Gross or Net         Scoped Level       Std/Bronze/Silver/Gold.         Not needed on consultancy         Primary DP Contact:       Link to Contact.         Not needed as mandatory         IDG have 3 contacts: Specialist, Client Services Advisor and Bus Dev Manager	Documents Sent:Two PDF/Doc uploads: Confirmation Letter AgreementEMB: Not these documents but do have booking form and assessment plan. They use symphony to send the confirmation emails and it would be ideal to automatically upload from there.IDG Don't have these docs Date Documents Sentxx/xx/xx – one for each document sent.Ideally have the date uploaded rather than date send Document Received: Scanned Signed agreemnt Staff List & Org Chart Not Needed, but do need to upload many other docs such as confirmation email or booking form Date Agreement Received: xx/xx/xx	First Day on Site:       xx/xx/xx         Last Day on Site:       xx/xx/xx         (ProjectOutcomeDecisionDate)         EMB can have consultancy projects which are 10         days spread over 4 months and they need to         record which days these are and when they are         completed.         IDG do need the days and the activity on each         day to tick off         Number of People Surveyed: xxx         IIP Survey Type:       New Drop down list of:         Face To Face       40	Report Received:Document scanned/ uploadedReport received date:xx/xx/xxReports are not used for Bus Review/ConsultancyReport Sent for QA:xx/xx/xxReport QA Approvedxx/xx/xxQA fields are not needed to be mandatory as they only QA 10%Should not be mandatory for IDGProject Status Outcome – auto filled in with option to overideProjectStatus – auto filled in with option to overrideAward Level Auto filled in and updated on award tableNot for AdvisoryReport Sent to client:xx/xx/xxCertificate Sent Date:xx/xx/xx	
Total Revenue Days Total Revenue Total Revenue Currency Total Costs Total Employees in Scop Total Employees intervie <b>Project Fields Required</b> Multiple Specialists: No Revenue Days: Daily Rate Total Revenue Scoped Level Translator required:	pe jewed I by Internatio Drop down and then 'o Default to z On-site and Default to z Default to z	box top select multiple specialists. Need to be a lead specialist other specialists'. See the specialist table details proposal. zero and not from proposal figure. Break down into Planning, d reporting. Defaulted to the proposal days and ability to overwrite.	Project Status:       Default to "Blanks to force filling in         Last Day on Site(Proj Outcome Decision Date):xx/xx/xx         Project Closure Date:       xx/xx/xx         Total Employees in Scope:       xxxx         Total Employees to be interviewed       xxxx         EMB: Employee Details not needed for Consultancy       IDG: Not needed at all         Translator required:       YES/NO Default to blank to force it to be filled in         EMB: Not needed       EMB and IDG: Not needed         Planning Meeting Date:       xx/xx/xx	Multiple Specialists:Drop down box to select multiple specialists. Need to be a lead specialist and then 'other specialist?Additional Items RequiredSpecialist Docs Sent:xx/xx/xx xx Document: Upload of Scanned plan or docx from specialist.Plan received from Specialist:xx/xx/xx Plan received from Specialist:Plan received from Specialist:xx/xx/xx xxPlan a Sent for QA:xx/xx/xx xx/xx/xxPlan QA Approvedxx/xx/xx xx/xxAbove items are not needed to be mandatory, but they do QA some reports IDG Does QA but not mandatoryAssessor Uploads Plan Price Confirmation Email sent out at this point For Advisory/Consultancy, could upload anything	9 27 Inicator fields: 9 Indicators x 3 Themes with 4 values. Required to take from Web site. Final Result: Calculation done on the 27 indicator fields above/	Add: Invoiced Date	
Documents Sent: Date Documents Sent: Document Received: Date Agreement Received Specialist Docs Sent: Document:	red::	Two PDF/Doc uploads: Confirmation Letter Agreement xx/xx/xx – one for each document sent. Scanned Signed agreement xx/xx/xx xx/xx/xx Upload of Scanned plan or docx from specialist.					
Plan received from Spec Report Received: Report received date: Evidence Fields:	cialist:	Document scanned xx/xx/xx Matrix of results needs to show how we calculate the award from this. Bill to email format and how we enter assessed, not assessed, failed, passed, partially met Award is Met/Not Met on Scoped level. Different scored required for different scoped level. Can change depending on scoped level and product. Need to indicate if all fields filled in or not					
Report Sent to client: Activity Type Plan Sent for QA: Plan QA Approved Report Sent for QA: Report QA Approved		xx/xx/xx Lkup_ActivityEventType (Note: May need to review values) xx/xx/xx xx/xx/xx xx/xx/xx xx/xx/xx					



# Project Process – Derecognition incl Enforced Recognition

Standard Project Screen Info		Derecognition Initiation	Pending Derecognition	Actual Derecognition	Outcome	
and then 'o No Revenue Days: Default to a	xx/xx/xx (There is quite a complex method of calculating this dependant on the award, the product and previous project outcome. This should be calculated anyway for a dashboard and therefore this same calculation should show here and be view only) For IDG, this date sets all of the deadlines for reminder etc and a complex workflow. (New currency Field)	Project Type       Lkup_Project         Primary DP Contact:       Link to Contact.         Project Status:       Default to "Blanks to forfilling in         Process Start Date (New Field):xx/xx/xx         Translator required:       YES/NO Default to blactore it to be filled in         Initial Contact:       Text Box         Document Upload:       Various Docs if required	Date Document     xx/xx/xx       nk to     Date acknowledged: xx/xx/xx       Who acknowledged: Lookup on contact table	Documents Sent: Actual De-rec Letter Date Document xx/xx/xx Date acknowledged: xx/xx/xx Who acknowledged: Lookup on contact table Document Upload: Signed De-rec returned Further Text: Text Box Document Upload: Signed De-rec returned		
Total Revenue Default to z	zero initially zero initially. :/Silver/Gold. Default to blank and non mandatory YES/NO Two PDF/Doc uploads: Confirmation Letter					
Date Documents Sent: Document Received: Date Agreement Received::	Agreement xx/xx/xx – one for each document sent. Scanned Signed agreement xx/xx/xx					
Specialist Docs Sent: Document: Plan received from Specialist:	xx/xx/xx Upload of Scanned plan or docx from specialist. xx/xx/xx					
Report Received: Report received date: Evidence Fields:	Document scanned xx/xx/xx Matrix of results needs to show how we calculate the award from this. Bill to email format and how we enter assessed, not assessed, failed, passed, partially met Award is Met/Not Met on Scoped level. Different scored required for different scoped level. Can change depending on scoped level and product. Need to indicate if all fields filled in or not					
Report Sent to client: Activity Type Plan Sent for QA: Plan QA Approved Report Sent for QA: Report QA Approved	xx/xx/xx Lkup_ActivityEventType (Note: May need to review values) xx/xx/xx xx/xx/xx xx/xx/xx xx/xx/xx xx/xx/					

### **New Tables**

### **Specialist Registraiton Screen**

Specialists and Employees need to either be contacts or an entity on their own. This would need to include DP non-specialist staff too so that PrimaryDeliveryCentreContact can be filled in on the project, however we could have this cross reference a table other than contacts.

### Fields to be on Registration Sscreen

 Registration Body:
 UK ,DP (North, South, etc), International, If international, then secondary box of: Belgium, Netherlands, New

 Zealand, Philippines, South Africa, Sweden. Allow IIP international to update this secondary list

Specialist Type:	Mulitple pick tick boxes of the following: Assessor, Adviser, Trainer, Trainee Advisor, Trainee Assessor,						
	Managing Assessor. Administrator. Have each of these for old framework and new framework.						
IIP Specialism:	Mulitple pick Tick boxes of lkup_Product						
Language Capability:	Mulitple pick Tick boxes with ability to choose multiple languages, Can IIP international update this list						
	themselves?						
Daily Rate:	This needs to be in Euros and GBP						
For EMB, this is differen	t per product, per project type and per client.						
IDG: Not used against A	ssessor						
Specialist Documents:	Link to Multiple documents with dates and description. Insurance Documents IIPI Use too						
Insurance Expiry Date:	xx/xx/xx IIPI Use too						
There are Travel, Profes	sional Indemnity and Liability Ins. Need expiry date for all of them						
Incurrence details not needed by ENAD							

Insurance details not needed by EMB Insurace managed outside CRM for IDG

 Registration Number:
 xxxxxxxx

 Registration Date:
 xx/xx/xx (Need to confim if this is 'first registered' date)

 Registration End Date:
 xx/xx/xx. This is to be able to log that a specialist is no longer working with the centre

First Name Last Name Salutation Job Title Company Name Email Address **Business Phone** Website URL Mobile Skype Address Address line 1 Address line 2 Address line 3 City County Postcode Country

Sector Experience – multi drop down of all 16 sectors Territory Specialist will visit. Lkup\_Region & County

Note: Some specialists are shared. Ideally we would have a note on the specialist to say allow sharing with particular centres too. A discussion required to consider the sharing of specialists too.

Note: EMB are OK with sharing their list of specialists, however this would be just their names. They would like it so that access to the full specialist data is only available to select personnel, very much like an HR database. EMB would not use the Specialist database as a pick list of the specialist to choose for a job. They do it manually through experience of the appropriate specialist.

### Languages

This is a list of languages to be used on the specialist Registration Screen

### <u>Currency</u>

A currency field needs to be added. Currently the two currencies are EUR and GBP, but we would llike a drop down in the event of future additional currencies. No conversion is required

### **Registration Body**

To be used on specialist screen. To include the following values: UK ,DP (North, South, etc), International, If international, then secondary box of: Belgium, Netherlands, New Zealand, Philippines, South Africa, Sweden. Allow IIP international to update this secondary list. Is this the same as the delivery partner table but with some added?

### Data Migration and User Access

EMB Use Dynamics CRM and need to migrate over all documents and data on their. There are considerable scanned docs and additional info.

IIP NI have a considerable amount of scanned documents and would need migration of this

IDG have a considerable amount of scanned documents and would need migration of this

EMB Specialists all use the full CRM licence for full access as part of their job and they would not be able to function with just uploading rights. They look at all the customer info as prep for the assessment and also to update the organisation during an assessment They have 20 Head office users and 60 specialists.

IDG Specialists have access to almost all of the CRM system where they can see all of their own customers details and history. There are some areas that they cannot update/delete records They have approx. 20Admin/HO Staff & 60-70 specialists. IIP NI Customers have access to see their own details on QIS but this is not needed

## **Additional Fields/Values**

<u>Contact</u> Add Skype Address field

<u>Project</u> Add Award Level

Organisation Add Currency Daily Rate

<u>Lkup\_SiteType</u> Add "Regional HO" to list

We need to know if it is the whole company of a multinational company, eg is it BT or BT openreach – Tick box of corporate or local. How should we represent this? Discuss with developers. EMB would like to know how to represent that it is part of a corporate

<u>Lkup\_projecttype</u> Add "Continued assessment" to list

International also have a "Diagnostic". It would have an outcome of 'working with IIP'. A Diagnostic is more than an active plan. This is exactly the same as an assessment but with half the staff numbers – same process compeltely

International also have an 18 month review. EMB have a business review which is consultancy

Lkup\_ContactTitle

Need to consider what titles to have for international, eg Mme, Herr, etc. Do we have a drop downlist?

### **Reminders required by IIP International**

A dashboard needs to be set up to show the number due and the number overdue of the following project items:

- Acknowledgements
- Client letters
- Assessor letters
- Agreements,
- Plans
- Reports Reports to Send
- Ouestionnaire
- No Outcome
- 18 month reviews or Reviews due

List of all reviews/fta's that completed 1 week ago to show account manager to follow up and assess if any further opportunity prospects

Dashboards of all 1 year old and 2 year old successful reviews to remind to say thankyou. IDG have a number of requirements here such as chasing reviews, questionnaires etc EMB will give us a list of workflows, alerts, dashboards and reports that they need. Their preference would be to have the capability to create their own dashboards/alerts and share them locally. The workflows would include reminders for service co-ordinators, customer satisfaction survey remindes etc.

### Other Items

There is some standard paperwork - can we standadise over all DP's and then do a mail merge

Cross Referent Activity Type that Michelle send with schema (Asked Michelle to resend)

Consider the matrix for passing and how we can fill it in easily – inputtable PDF If a customer does H&W, it gives them 30% of the Standard marks, so they do it together with silver, bronze, std, gold.

Can we auto populate industry sector off of sic code.

We need to consider if we have multiple opportunities for shopping list proposals When a project finished, International would like to automatically create a new project for the following assessment and run the dashboards on the work in the future based on the projects created. EMB would like to be able to upload their own templates for mail merging, and also would like consistent de-accreditation letters, reminders to be able to be used.

IDG want to create their own templates for sending out communications

Recurring Projects They have a new project put on as soon as one project ends. They put the figures for revenue and days on in advance to get projected revenue in advance too.

What to do. EMB Do not use re-curring projects and just do it by workflow. IDG do it by workflow/triggers

IIP International They have their data with one and one internet. They have SQL access to the DB as well as a reporting tool that can export to excel.

They have a schema and the format is very much like the IDG format.

International would like to ensure that SIC codes are mandatory 5 digits instead of 2/4. They also would like the data migrated as blank. So that they are forced to fill it in. CW to check that this is the current sic code list.

IIP NI have a Group Contract system which needs to be accounted for

Academy Projects are very much like a sale of a good rather than an accreditation, but currently they are managed as projects. Tey only have the following fields: deadline, billing details, noumber of licences, cost per lic, invoiced? It give the company Academy status.

IDG set the date of the award as the last day on site, not 3 years from the last one, but the deadline is still 3 years from the last award. IDG would like to be able to export data to Access, not just Excel