Lead/Opportunity Process

Colours Black: International. Blue: NI. Green: EMB. Red: Mandatory

Standard Lead Screen Info | Lead Qualification | Pre-Sale Engagement | Proposal | Decision (Proposal&Application Signed)

Standard Lead Screen Info

Lead Fields Required by International

Salutation lkup_Salutation
First Name
Last Name
JobPosition
E-Mail
Phone
Mobile
Skype Address (Add to Schema)
Sector Ownership (Add to Schema in Lead Table)

Lead Fields Required by Schema

Product lkup_Product
Lead Status lkup_LeadStatus
Lead SourceID lkup_LeadSource
Lead Origin WeblinkURL
Mailing Address Line 1
Mailing Address Line 2
Mailing Town
Mailing City
Mailing County ID
Mailing Postcode
Mailing Country lkup_Country
Mailing Region ID lkup_Region
Fax
Website Address
Do Not Contact
Organisation Name EMB would like this mandatory
IndustrySectorID: lkup_OrganisationIndustrySector
Legal Structure: lkup_OrganisationLegalStructureID
SIC Code lku_SIC

Lead Fields Required by Journey (To right)

Account
Contact
Client Est Budget: £xxx,xxx
Est Revenue: £xxx,xxx GBP or EUR
Payment Currency: GBP/EUR
Est Days: xxx (Break down into Planning, On-site and reporting)
Probability: xxx%
Purchase Timeframe: By xx/xx/xx
Project Type: Dropdown of Lkup_ProjectType
Estimated Close Date: By xx/xx/xx
Customer Need: Text
Multinational: Yes/No
Discussions Text
Daily Rate
Application Form Sent Date: xx/xx/xx
Application Form: Link to Document
Proposal: Link to multiple Documents in case of revisions
Proposal Sent Date: xx/xx/xx

Signed application Form received: xx/xx/xx
Signed Application Form: Link to Document
Other forms received: Staff List
Organisational Chart
'Other Forms'
Proposal Form Signed xx/xx/xx
Proposal Form: Link to Document

Other fields from Schema – Unimportant for IIP International

Lead Status Reason ID: lkup_LeadStatusReason
All Lead fields from Schema and option to bring through if/when creating new account/contact. IDG want this too and when creating the organisation/contact from this, would like as many fields to be defaulted for ease of creation. They want to record Org Sector Ownership of the organisation

Note Red items are mandatory

Lead Qualification

Existing Account: Link to Account
Existing Contact: Link to Contact
Re-allocate: Allow DP to allocate to a List Staff Members/Licence Holders drop down. This should update the owner field. Should only allow reallocation from country DP 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

We would like to re-allocate to the following:

Reallocated to: Owner
Reallocated to: Manager

Qualify Use the qualify button on the top bar and the drop down from there

Pre-Sale Engagement

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)
Discusssions Text
Product ID: lkup_product
Multiple Activities: lkup_activityegventtype's 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

Proposal

Application Form Sent Date: xx/xx/xx mandatory
Application Form: Link to Document
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 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)

Decision (Proposal&Application Signed)

Signed application Form received: xx/xx/xx
Signed Application Form: Link to Document
EMB Don't use application forms unless it is an assessment.
IDG 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
Proposal Form: Link to Document
IDG have a Booking form instead of a Proposal
Estimated First Day on Site
Estimated Last Day on Site

Note Red items are mandatory

EMB Workshops

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.

With a workshop, EMB need to know the know the date of attendance

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.

Question: How is leadership and management consultancy represented. It is conlustancy as project type, but what about the product?

Schema Fields Populated on Creation of Lead

Lead Table
- 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 Record: All Mandatory Fields filled in
  - ActivityEventReasonID = Initial/Renewed Contact???
    - (Lookup to Lkup_OrganisationStatusReason Table)
  - Lead Status ID =Same as the change in Lead Status ID 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 at this stage
Organisation, Organisation Activity

A change will be required to the reports as the current Timed 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]

Schema Fields Populated on Qualification of Lead

Lead Table
- Record in Lead Table Updated
  - Lead Status ID changed to Qualified
  - Lead Status Reason ID = Any where Lead Status is 2 on Lookup Table
    - (Lookup to Lkup_LeadStatusReason Table)
  - Created Date = No Change
  - Last Updated Date = Todays

Lead Activity
- Record in Lead Activity Table created.
  - Lead Activity Record: All Mandatory Fields filled in
  - ActivityEventReasonID = Client Fully Informed??
    - (Lookup to Lkup_OrganisationStatusReason Table)
  - Lead Status ID= Same as the change in Lead Status ID above
  - Date of Contact= Today or before
  - Created Date = Todays date
  - Last Updated Date = Todays date

Contact
- Record in Contact Table Created
  - ContactRecord: All Mandatory Fields filled in
  - Last Updated Date = Todays date
  - Created Date = Todays date

Organisation
- Record in Organisation Table Created
  - Origin Lead ID = The Lead ID this prospect was created from.
  - Do Not Contact = 0
  - Last Updated Date = Todays date
  - Created Date = Todays date

Schema Fields Populated on Qualification of Lead

OrganisationCurrentStatus
- Record in Organisation Current Status Table created
  - Organisation Current Status Record: All Mandatory Fields filled in
  - Current Status ID= Prospect
  - Status Change Date = Todays date or No more than 1 week previously
  - Change Reason ID = 'Client Fully Informed'
    - (Lookup to Lkup_OrganisationStatusReason Table)
  - Created Date = Todays date
  - Last Updated Date = Todays date

Organisation Status Movement
- Record in Organisation Status Movement Table created.
  - OrganisationStatusID =Same as the change in organisation current status above
  - OrganisationStatus ChangeDate = Same as Status Change Date above
  - ProjectID = Blank
  - OrganisationStatusChange Reason ID =Same as the Change Reason ID on the Organisation CurrentStatus above.
    - (Lookup to Lkup_OrganisationStatusReason Table)
  - Created Date = Todays date
  - Last Updated Date = Same Last Updated Date as Lead Table above

OrganisationActivity
- Record in Organisation Activity Table created.
  - All mandatory fields filled in
  - ActivityEventReasonID = ??? (Potentially remove this field. See Notes)
    - (Lookup to Lkup_OrganisationEventReason Table)
  - OrganisationCurrentStatusID = ??? (Potentially remove this field. See Notes)
  - OrganisationNewStatusID = Committed
  - OrganisationStatusChangeReasonID =Same as the Change Reason ID on the Organisation CurrentStatus above.
    - (Lookup to Lkup_OrganisationStatusReason Table)
  - Date of Contact = Todays date
  - Next Visit Requested Date = Blank
  - Contacted by Organisation = Blank
  - Created Date = Todays date
  - Last Updated Date = Todays Date

Schema Fields Populate on Disqualification of 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= Today or before
  - Created Date = Todays date
  - Last Updated Date = Todays date

Project Process - FTA

Standard Project Screen Info | Context Discussion | Final Proposal | On Site | Outcome

Project Fields Required by Schema

Organisation ID (Autonumber)
Product lkup_Product
PrimaryDeliveryCentreContact lkup_Contact – see Notes on Additional Tables

Project Number (DP's Number not IIP - Autonumber??)
Priority lkup_Priority
Project Type ID Lkup_projectype
Project Status lkup_projectstatus
Project Status Outcome lkup_ProjectStatusOutcome
First Day on Site: xx/xx/xx
Last Day on Site (Project Outcome DecisionDate) xx/xx/xx
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)
For IDG, this date sets all of the deadlines for reminder etc and a complex workflow.

Total Revenue Days
Total Revenue
Total Revenue Currency (New currency Field)
Total Costs
Total Employees in Scope
Total Employees interviewed

Project Fields Required by International

Multiple Specialists: 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
Total Revenue Default to zero initially.
Scoped Level Std/Bronze/Silver/Gold. Default to blank and non mandatory
Translator required: YES/NO

Documents Sent: Two PDF/Doc uploads:
Confirmation Letter
Agreement
Date Documents Sent: xx/xx/xx – one for each document sent.
Document Received: Scanned Signed agreement
Date Agreement Received:: xx/xx/xx

Specialist Docs Sent: xx/xx/xx
Document: Upload of Scanned plan or docx from specialist.
Plan received from Specialist: xx/xx/xx

Report Received: Document scanned
Report received date: xx/xx/xx
Evidence 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 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: xx/xx/xx
Activity Type Lkup_ActivityEventType (Note: May need to review values)
Plan Sent for QA: xx/xx/xx
Plan QA Approved xx/xx/xx
Report Sent for QA: xx/xx/xx
Report QA Approved xx/xx/xx

Note Red items are mandatory

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
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

Documents Sent: Two PDF/Doc uploads:
Confirmation Letter
Agreement

EMB: 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 Sent xx/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
Multiple Specialists: Drop down box to select multiple specialists.
Need to be a lead specialist and then 'other specialists'

Additional Items Required
Specialist Docs Sent: xx/xx/xx
Document: Upload of Scanned plan or docx from specialist.
Plan received from Specialist: xx/xx/xx
Plan Sent for QA: xx/xx/xx
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

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 with option to override
Award Level Auto filled in and updated on award table
Not for Advisory
Report Sent to client: xx/xx/xx
Certificate Sent Date: xx/xx/xx
Add: Invoiced Date

Potential Requirement to do a mail merge of data from Indicator fields and new text to create final report. Discussion to be had with m-Hance

Project Process - Review

Standard Project Screen Info | Context Discussion | Final Proposal | On Site | Outcome

Project Fields Required by Schema

Organisation ID	(Autonumber)
Product	lkup_Product
PrimaryDeliveryCentreContact	lkup_Contact – see Notes on Additional Tables
Project Number	(DP's Number not IIP - Autonumber??)
Priority	lkup_Priority
Project Type ID	Lkup_projectype
Project Status	lkup_projectstatus
Project Status Outcome	lkup_ProjectStatusOutcome
First Day on Site:	xx/xx/xx
Last Day on Site (Project Outcome DecisionDate)	xx/xx/xx
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) For IDG, this date sets all of the deadlines for reminder etc and a complex workflow.
Total Revenue Days	
Total Revenue	
Total Revenue Currency	(New currency Field)
Total Costs	
Total Employees in Scope	
Total Employees interviewed	

Project Fields Required by International

Multiple Specialists:	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
Total Revenue	Default to zero initially.
Scoped Level	Std/Bronze/Silver/Gold. Default to blank and non mandatory
Translator required:	YES/NO
Documents Sent:	Two PDF/Doc uploads: Confirmation Letter Agreement
Date Documents Sent:	xx/xx/xx – one for each document sent.
Document Received:	Scanned Signed agreement
Date Agreement Received::	xx/xx/xx
Specialist Docs Sent:	xx/xx/xx
Document:	Upload of Scanned plan or docx from specialist.
Plan received from Specialist:	xx/xx/xx
Report Received:	Document scanned
Report received date:	xx/xx/xx
Evidence 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 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:	xx/xx/xx
Activity Type	Lkup_ActivityEventType (Note: May need to review values)
Plan Sent for QA:	xx/xx/xx
Plan QA Approved	xx/xx/xx
Report Sent for QA:	xx/xx/xx
Report QA Approved	xx/xx/xx

Note Red items are mandatory

Context Discussion

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
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
3 month extension: — Yes/No

Final Proposal

Documents Sent: — Two PDF/Doc uploads: Confirmation Letter Agreement

EMB: 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 Sent — xx/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
Multiple Specialists: — Drop down box to select multiple specialists. Need to be a lead specialist and then 'other specialists'

Additional Items Required
Specialist Docs Sent: — xx/xx/xx
Document: Upload of Scanned plan or docx from specialist.
Plan received from Specialist: — xx/xx/xx
Plan Sent for QA: — xx/xx/xx
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

On Site

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/

Outcome

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 with option to override
Award Level Auto filled in and updated on award table
Not for Advisory
Report Sent to client: — xx/xx/xx
Certificate Sent Date: — xx/xx/xx
Add: Invoiced Date

Potential Requirement to do a mail merge of data from Indicator fields and new text to create final report. Discussion to be had with m-Hance

Project Process - Advisory

Standard Project Screen Info | Context Discussion | Final Proposal | On Site | Outcome

Project Fields Required by Schema

Organisation ID	(Autonumber)
Product	lkup_Product
PrimaryDeliveryCentreContact	lkup_Contact – see Notes on Additional Tables
Project Number	(DP's Number not IIP - Autonumber??)
Priority	lkup_Priority
Project Type ID	Lkup_projectype
Project Status	lkup_projectstatus
Project Status Outcome	lkup_ProjectStatusOutcome
First Day on Site:	xx/xx/xx
Last Day on Site (Project Outcome DecisionDate)	xx/xx/xx
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) For IDG, this date sets all of the deadlines for reminder etc and a complex workflow.
Total Revenue Days	
Total Revenue	
Total Revenue Currency	(New currency Field)
Total Costs	
Total Employees in Scope	
Total Employees interviewed	

Project Fields Required by International

Multiple Specialists:	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
Total Revenue	Default to zero initially.
Scoped Level	Std/Bronze/Silver/Gold. Default to blank and non mandatory
Translator required:	YES/NO
Documents Sent:	Two PDF/Doc uploads: Confirmation Letter Agreement
Date Documents Sent:	xx/xx/xx – one for each document sent.
Document Received:	Scanned Signed agreement
Date Agreement Received::	xx/xx/xx
Specialist Docs Sent:	xx/xx/xx
Document:	Upload of Scanned plan or docx from specialist.
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Report Received:	Document scanned
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Evidence 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 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:	xx/xx/xx
Activity Type	Lkup_ActivityEventType (Note: May need to review values)
Plan Sent for QA:	xx/xx/xx
Plan QA Approved	xx/xx/xx
Report Sent for QA:	xx/xx/xx
Report QA Approved	xx/xx/xx

Note Red items are mandatory

Context Discussion

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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
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
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
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

Final Proposal

Documents Sent: — Two PDF/Doc uploads:
KEEP: Confirmation Letter
REMOVE: Agreement
Add: **Alternative Agrreement**
EMB: 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
Alter to reflct docs kept: Date Documents Sent xx/xx/xx – one for each document sent.
Ideally have the date uploaded rather than date send
Document Received: Scanned Signed
Alternative:agreemnt
Not Needed, but do need to upload many other docs such as confirmation email or booking form
Date Agreement Received: xx/xx/xx
Multiple Specialists: — Drop down box to select multiple specialists. 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

On Site

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/

Outcome

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/Consultancy
REMOVE?: Report Sent for QA: xx/xx/xx
REMOVE?: 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 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
Add: Invoiced Date

Potential Requirement to do a mail merge of data from Indicator fields and new text to create final report. Discussion to be had with m-Hance

Project Process - Diagnostic

Standard Project Screen Info → Context Discussion → Final Proposal → On Site → Outcome

Standard Project Screen Info

Project Fields Required by Schema

Organisation ID	(Autonumber)
Product	lkup_Product
PrimaryDeliveryCentreContact	lkup_Contact – see Notes on Additional Tables
Project Number	(DP's Number not IIP - Autonumber??)
Priority	lkup_Priority
Project Type ID	Lkup_projectype
Project Status	lkup_projectstatus
Project Status Outcome	lkup_ProjectStatusOutcome
First Day on Site:	xx/xx/xx
Last Day on Site (Project Outcome DecisionDate)	xx/xx/xx
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) For IDG, this date sets all of the deadlines for reminder etc and a complex workflow.
Total Revenue Days	
Total Revenue	
Total Revenue Currency	(New currency Field)
Total Costs	
Total Employees in Scope	
Total Employees interviewed	

Project Fields Required by International

Multiple Specialists:	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
Total Revenue	Default to zero initially.
Scoped Level	Std/Bronze/Silver/Gold. Default to blank and non mandatory
Translator required:	YES/NO
Documents Sent:	Two PDF/Doc uploads: Confirmation Letter Agreement
Date Documents Sent:	xx/xx/xx – one for each document sent.
Document Received:	Scanned Signed agreement
Date Agreement Received::	xx/xx/xx
Specialist Docs Sent:	xx/xx/xx
Document:	Upload of Scanned plan or docx from specialist.
Plan received from Specialist:	xx/xx/xx
Report Received:	Document scanned
Report received date:	xx/xx/xx
Evidence 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 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:	xx/xx/xx
Activity Type	Lkup_ActivityEventType (Note: May need to review values)
Plan Sent for QA:	xx/xx/xx
Plan QA Approved	xx/xx/xx
Report Sent for QA:	xx/xx/xx
Report QA Approved	xx/xx/xx

Note Red items are mandatory

Context Discussion

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

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

Final Proposal

Documents Sent: — Two PDF/Doc uploads: Confirmation Letter Agreement

EMB: 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 Sent — xx/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

Multiple Specialists: — Drop down box to select multiple specialists. Need to be a lead specialist and then 'other specialists'

Additional Items Required

Specialist Docs Sent: xx/xx/xx

Document: Upload of Scanned plan or docx from specialist.

Plan received from Specialist: xx/xx/xx

Plan Sent for QA: xx/xx/xx

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

On Site

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/

Outcome

Report Received: — Document scanned/ uploaded

Report received date: xx/xx/xx

Reports are not used for Bus Review/Consultancy

Make Non Mandatory: Report Sent for QA: xx/xx/xx

Make Non Mandatory: 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 with option to override

Award Level Auto filled in and updated on award table

Not for Advisory

Report Sent to client: xx/xx/xx

Certificate Sent Date: xx/xx/xx

Add: Invoiced Date

Potential Requirement to do a mail merge of data from Indicator fields and new text to create final report. Discussion to be had with m-Hance

Project Process - Interim

Standard Project Screen Info | Context Discussion | Final Proposal | On Site | Outcome

Standard Project Screen Info

Project Fields Required by Schema

Organisation ID	(Autonumber)
Product	lkup_Product
PrimaryDeliveryCentreContact	lkup_Contact – see Notes on Additional Tables
Project Number	(DP's Number not IIP - Autonumber??)
Priority	lkup_Priority
Project Type ID	Lkup_projectype
Project Status	lkup_projectstatus
Project Status Outcome	lkup_ProjectStatusOutcome
First Day on Site:	xx/xx/xx
Last Day on Site (Project Outcome DecisionDate)	xx/xx/xx
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) For IDG, this date sets all of the deadlines for reminder etc and a complex workflow.
Total Revenue Days	
Total Revenue	
Total Revenue Currency	(New currency Field)
Total Costs	
Total Employees in Scope	
Total Employees interviewed	

Project Fields Required by International

Multiple Specialists:	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
Total Revenue	Default to zero initially.
Scoped Level	Std/Bronze/Silver/Gold. Default to blank and non mandatory
Translator required:	YES/NO
Documents Sent:	Two PDF/Doc uploads: Confirmation Letter Agreement
Date Documents Sent:	xx/xx/xx – one for each document sent.
Document Received:	Scanned Signed agreement
Date Agreement Received::	xx/xx/xx
Specialist Docs Sent:	xx/xx/xx
Document:	Upload of Scanned plan or docx from specialist.
Plan received from Specialist:	xx/xx/xx
Report Received:	Document scanned
Report received date:	xx/xx/xx
Evidence 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 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:	xx/xx/xx
Activity Type	Lkup_ActivityEventType (Note: May need to review values)
Plan Sent for QA:	xx/xx/xx
Plan QA Approved	xx/xx/xx
Report Sent for QA:	xx/xx/xx
Report QA Approved	xx/xx/xx

Note Red items are mandatory

Context Discussion

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
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
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
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

Final Proposal

Need to clarify as expected to vary between centres
Documents Sent: Two PDF/Doc uploads:
REMOVE: Confirmation Letter
REMOVE: Agreement
Need to keep email correspondence too.
Need to clarify as expected to vary between centres
EMB: 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
Alter to reflct docs kept: Date Documents Sent xx/xx/xx – one for each document sent.
Ideally have the date uploaded rather than date send
Document Received: Scanned Signed **alternative:**agreemnt
Not Needed, but do need to upload many other docs such as confirmation email or booking form
Date Agreement Received: xx/xx/xx
Multiple Specialists: Drop down box to select multiple specialists. 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

On Site

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/

Outcome

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/Consultancy
REMOVE?: Report Sent for QA: xx/xx/xx
REMOVE?: 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 override
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
Add: Invoiced Date

Potential Requirement to do a mail merge of data from Indicator fields and new text to create final report. Discussion to be had with m-Hance

Project Process – Strategic Review

Standard Project Screen Info

Context Discussion

Final Proposal

On Site

Outcome

Project Fields Required by Schema

Organisation ID	(Autonumber)
Product	lkup_Product
PrimaryDeliveryCentreContact	lkup_Contact – see Notes on Additional Tables
Project Number	(DP's Number not IIP - Autonumber??)
Priority	lkup_Priority
Project Type ID	Lkup_projectype
Project Status	lkup_projectstatus
Project Status Outcome	lkup_ProjectStatusOutcome
First Day on Site:	xx/xx/xx
Last Day on Site (Project Outcome DecisionDate)	xx/xx/xx
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) For IDG, this date sets all of the deadlines for reminder etc and a complex workflow.
Total Revenue Days	
Total Revenue	
Total Revenue Currency	(New currency Field)
Total Costs	
Total Employees in Scope	
Total Employees interviewed	

Project Fields Required by International

Multiple Specialists:	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
Total Revenue	Default to zero initially.
Scoped Level	Std/Bronze/Silver/Gold. Default to blank and non mandatory
Translator required:	YES/NO
Documents Sent:	Two PDF/Doc uploads: Confirmation Letter Agreement
Date Documents Sent:	xx/xx/xx – one for each document sent.
Document Received:	Scanned Signed agreement
Date Agreement Received::	xx/xx/xx
Specialist Docs Sent:	xx/xx/xx
Document:	Upload of Scanned plan or docx from specialist.
Plan received from Specialist:	xx/xx/xx
Report Received:	Document scanned
Report received date:	xx/xx/xx
Evidence 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 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:	xx/xx/xx
Activity Type	Lkup_ActivityEventType (Note: May need to review values)
Plan Sent for QA:	xx/xx/xx
Plan QA Approved	xx/xx/xx
Report Sent for QA:	xx/xx/xx
Report QA Approved	xx/xx/xx

Note Red items are mandatory

Context Discussion

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

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

Final Proposal

Documents Sent: — Two PDF/Doc uploads: Confirmation Letter Agreement

EMB: 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 Sent — xx/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

Multiple Specialists: — Drop down box to select multiple specialists. Need to be a lead specialist and then 'other specialists'

Additional Items Required

Specialist Docs Sent: xx/xx/xx

Document: Upload of Scanned plan or docx from specialist.

Plan received from Specialist: xx/xx/xx

Plan Sent for QA: xx/xx/xx

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

On Site

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/

Outcome

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 with option to override

REMOVE: Award Level Auto filled in and updated on award table

Not for Advisory

Report Sent to client: xx/xx/xx

Certificate Sent Date: xx/xx/xx

Add: Invoiced Date

Potential Requirement to do a mail merge of data from Indicator fields and new text to create final report. Discussion to be had with m-Hance

Project Process – Continued Assessment, Retaining Recognition, Top Up

Standard Project Screen Info | Context Discussion | Final Proposal | On Site | Outcome

Project Fields Required by Schema

Organisation ID	(Autonumber)
Product	lkup_Product
PrimaryDeliveryCentreContact	lkup_Contact – see Notes on Additional Tables
Project Number	(DP's Number not IIP - Autonumber??)
Priority	lkup_Priority
Project Type ID	Lkup_projectype
Project Status	lkup_projectstatus
Project Status Outcome	lkup_ProjectStatusOutcome
First Day on Site:	xx/xx/xx
Last Day on Site (Project Outcome DecisionDate)	xx/xx/xx
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) For IDG, this date sets all of the deadlines for reminder etc and a complex workflow.
Total Revenue Days	
Total Revenue	
Total Revenue Currency	(New currency Field)
Total Costs	
Total Employees in Scope	
Total Employees interviewed	

Project Fields Required by International

Multiple Specialists:	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
Total Revenue	Default to zero initially.
Scoped Level	Std/Bronze/Silver/Gold. Default to blank and non mandatory
Translator required:	YES/NO
Documents Sent:	Two PDF/Doc uploads: Confirmation Letter Agreement
Date Documents Sent:	xx/xx/xx – one for each document sent.
Document Received:	Scanned Signed agreement
Date Agreement Received::	xx/xx/xx
Specialist Docs Sent:	xx/xx/xx
Document:	Upload of Scanned plan or docx from specialist.
Plan received from Specialist:	xx/xx/xx
Report Received:	Document scanned
Report received date:	xx/xx/xx
Evidence 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 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:	xx/xx/xx
Activity Type	Lkup_ActivityEventType (Note: May need to review values)
Plan Sent for QA:	xx/xx/xx
Plan QA Approved	xx/xx/xx
Report Sent for QA:	xx/xx/xx
Report QA Approved	xx/xx/xx

Note Red items are mandatory

Context Discussion

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
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

Final Proposal

Documents Sent: — Two PDF/Doc uploads: Confirmation Letter Agreement
EMB: 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 Sent — xx/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
Multiple Specialists: — Drop down box to select multiple specialists. Need to be a lead specialist and then 'other specialists'

Additional Items Required
Specialist Docs Sent: — xx/xx/xx
Document: Upload of Scanned plan or docx from specialist.
Plan received from Specialist: — xx/xx/xx
Plan Sent for QA: — xx/xx/xx
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

On Site

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/

Outcome

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 with option to override
Award Level Auto filled in and updated on award table
Not for Advisory
Report Sent to client: — xx/xx/xx
Certificate Sent Date: — xx/xx/xx
Add: Invoiced Date

Potential Requirement to do a mail merge of data from Indicator fields and new text to create final report. Discussion to be had with m-Hance

Project Process – Derecognition incl Enforced Recognition

Standard Project Screen Info | Derecognition Initiation | Pending Derecognition | Actual Derecognition | Outcome

Project Fields Required by Schema

Organisation ID	(Autonumber)
Product	lkup_Product
PrimaryDeliveryCentreContact	lkup_Contact – see Notes on Additional Tables
Project Number	(DP's Number not IIP - Autonumber??)
Priority	lkup_Priority
Project Type ID	Lkup_projectype
Project Status	lkup_projectstatus
Project Status Outcome	lkup_ProjectStatusOutcome
First Day on Site:	xx/xx/xx
Last Day on Site (Project Outcome DecisionDate)	xx/xx/xx
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) For IDG, this date sets all of the deadlines for reminder etc and a complex workflow.
Total Revenue Days	
Total Revenue	
Total Revenue Currency	(New currency Field)
Total Costs	
Total Employees in Scope	
Total Employees interviewed	

Project Fields Required by International

Multiple Specialists:	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
Total Revenue	Default to zero initially.
Scoped Level	Std/Bronze/Silver/Gold. Default to blank and non mandatory
Translator required:	YES/NO
Documents Sent:	Two PDF/Doc uploads: Confirmation Letter Agreement
Date Documents Sent:	xx/xx/xx – one for each document sent.
Document Received:	Scanned Signed agreement
Date Agreement Received::	xx/xx/xx
Specialist Docs Sent:	xx/xx/xx
Document:	Upload of Scanned plan or docx from specialist.
Plan received from Specialist:	xx/xx/xx
Report Received:	Document scanned
Report received date:	xx/xx/xx
Evidence 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 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:	xx/xx/xx
Activity Type	Lkup_ActivityEventType (Note: May need to review values)
Plan Sent for QA:	xx/xx/xx
Plan QA Approved	xx/xx/xx
Report Sent for QA:	xx/xx/xx
Report QA Approved	xx/xx/xx

Note Red items are mandatory

Derecognition Initiation

Project Type	Lkup_Project
Primary DP Contact:	Link to Contact.
Project Status:	Default to "Blanks to force filling in
Process Start Date (New Field):xx/xx/xx	
Translator required:	YES/NO Default to blank to force it to be filled in
Initial Contact:	Text Box
Document Upload:	Various Docs if required

Pending Derecognition

REMOVE all this column for enforced derec's

Documents Sent:	Pending De-rec Letter
Date Document	xx/xx/xx
Date acknowledged: xx/xx/xx	
Who acknowledged: Lookup on contact table	
Further Text:	Text Box
Document Upload:	Various Docs if required

Actual Derecognition

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

Outcome

Project Status Outcome – auto filled in with option to overide

ProjectStatus – auto filled in with option to override

Award Level Auto filled in and updated on award table

Need for Followup? 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 different per product, per project type and per client.
IDG: Not used against Assessor
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, Professional Indemnity and Liability Ins. Need expiry date for all of them
Insurance details not needed by EMB
Insurace managed outside CRM for IDG
Registration Number: xxxxxxxxx
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

Currency

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 assesssment 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

Contact
Add Skype Address field

Project
Add Award Level

Organisation
Add Currency
Daily Rate

Lkup_SiteType
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

Lkup_projecttype
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
- Questionnaire
- 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