

Advisory Services delivery management process



Successful project execution depends on the effective collaboration of all team members as they follow this delivery process.

Our mindset:

- The process is designed to be flexible and adaptive to the circumstances of the client
- PLs align and oversee their Delivery Consultants for each project
- Reinforce timelines with clients and facilitate timely project completion
- Reduce dormancy by pro-actively addressing potential risks

Legend

Responsibility		Roles			
Accountable	AC	Assignment Coordinator	PD	Practice Director	
Support	AO	Accounting Officer	PL	Project Lead	
Highly recommended attendance	BD	Business Development	QA	Quality Assurance	
C.X.X.X: BDCpedia procedure reference	DC	Delivery Consultant	OS	Operations Support	

Plan project			Deliver project					
Assign resources		Consultant contract & Project set-up	Complete Handoff	Hold kickoff with client	Deliver solution	Manage project	Manage project adjustments	Perform QA
Roles	AC	OS	PL	DC, PL	DC	PL	PL, OS	QA
	PL		BD, DC				BD	DC
				BD				
Key points	<ul style="list-style-type: none"> → Coordinate assignment with practice representative → Set-up Project team Site in O365 	<ul style="list-style-type: none"> → Coordinate Consultant Contract → Complete project set-up 	<ul style="list-style-type: none"> → Transfer from BD to delivery team → Share info, plan next steps → Short call (ideally) or email → PL aligns DC pre-meeting → Risk assessment of project 	<ul style="list-style-type: none"> → Official start with client → Get client agreement on goals, timetable and how we will work together to set winning conditions 	<ul style="list-style-type: none"> → Schedule and lead meetings with client → Execute project and share deliverables as per methodology 	<ul style="list-style-type: none"> → Follow-up on project progress → Update project progress, health, notes, completed milestone, etc. → Timely identification and action to resolve issues 	<ul style="list-style-type: none"> → Amend contracts to reflect material changes in scope, etc. → Maintain alignment on expectations → Process refund, credit note, write-off 	<ul style="list-style-type: none"> → Review deliverables before presenting to client to ensure work meets standards
SLA	→ 48h after project is opened & resources are identified	→ 24h after assignment					→ 3-5 days including approval and budget adjustment	

Deliver project		Client billing		Invoice / Timesheet		Close project		
Complete handback		Present final deliverables	Process client billing	Manage account receivable	Manage consultant invoice	Manage timesheets	Finalize project for closing	Verify closing conditions
Roles	PL	DC	OS	OS	PL	PL, PD	PL	OS
	BD, DC		AO	BD, AO	OS			AO
		PL, BD						
Key points	<ul style="list-style-type: none"> → Transfer back resp. from delivery team to BD → Alignment prior to presentation to client → Position BD well for future sales → Short call (ideally) or email 	<ul style="list-style-type: none"> → Present deliverables to client → Confirm end of project with client → Identify subsequent project opportunities 	<ul style="list-style-type: none"> → Triggered based on completion of billable milestones by PL 	<ul style="list-style-type: none"> → Follow-up on overdue accounts → Non-payment may necessitate stoppage of project 	<ul style="list-style-type: none"> → Operations Support processes Consultant invoices and enters in IRIS → PL reviews invoice, tasklist and approves 	<ul style="list-style-type: none"> → All internal resources complete weekly timesheets → PD responsible to approve them 	<ul style="list-style-type: none"> → Evaluate network consultant performance → Finalize tasks in IRIS for closing 	<ul style="list-style-type: none"> → All deliverables saved → All invoicing transactions processed → Project closed in systems
SLA			→ 3 days	→ Beginning of each month	→ 5 days	→ Weekly		<ul style="list-style-type: none"> → Regular: 4 days → Cancellation: 4 to 15 days