

Customer On-Boarding Process

SAM sends email introducing You and PL.

You get introduced to the offshore team members.

1 SALES HANDOVER

2 KICK-OFF MEETING

3 TEAM INTRODUCTION

Pre-start date

WORK BEGINS!

Billing Starts.

Business Situation	People	Engineering	Communication	Relevant Org Policies	Other Expectations
<ul style="list-style-type: none"> • Business brief • Purpose of current Project • How we and our work fit into your plans 	<ul style="list-style-type: none"> • Who does what • Crisis-handling contacts • Relevant Roles / People on your team 	<ul style="list-style-type: none"> • Preferred Project Management, Code Management and Bug Tracking Systems • VPN, Security and Access details • Hosting / Staging Server options • Existing system learning curve • Work hours, Testing hours 	<ul style="list-style-type: none"> • Modes of status reporting (email, phone, Skype, GoToMeeting) • Frequency of status reporting (daily / weekly / on-need) • Feedback cycle • Timesheet maintenance option 	<ul style="list-style-type: none"> • Time zone overlap • Local holiday list • Leave plan • Bonuses for people 	<ul style="list-style-type: none"> • Scoping • Rework • Feedback response time

LEGEND: You Client (You) SAM Sales Account Manager (SAM) PL Project Lead (PL) Team Team of Developers