bluespark

(Sales + PM) x productive collaboration=
happy team + happy client

Kyle: bozo
sales guy

Ashleigh:
overworked pm

Sound Familiar?

Presented by:

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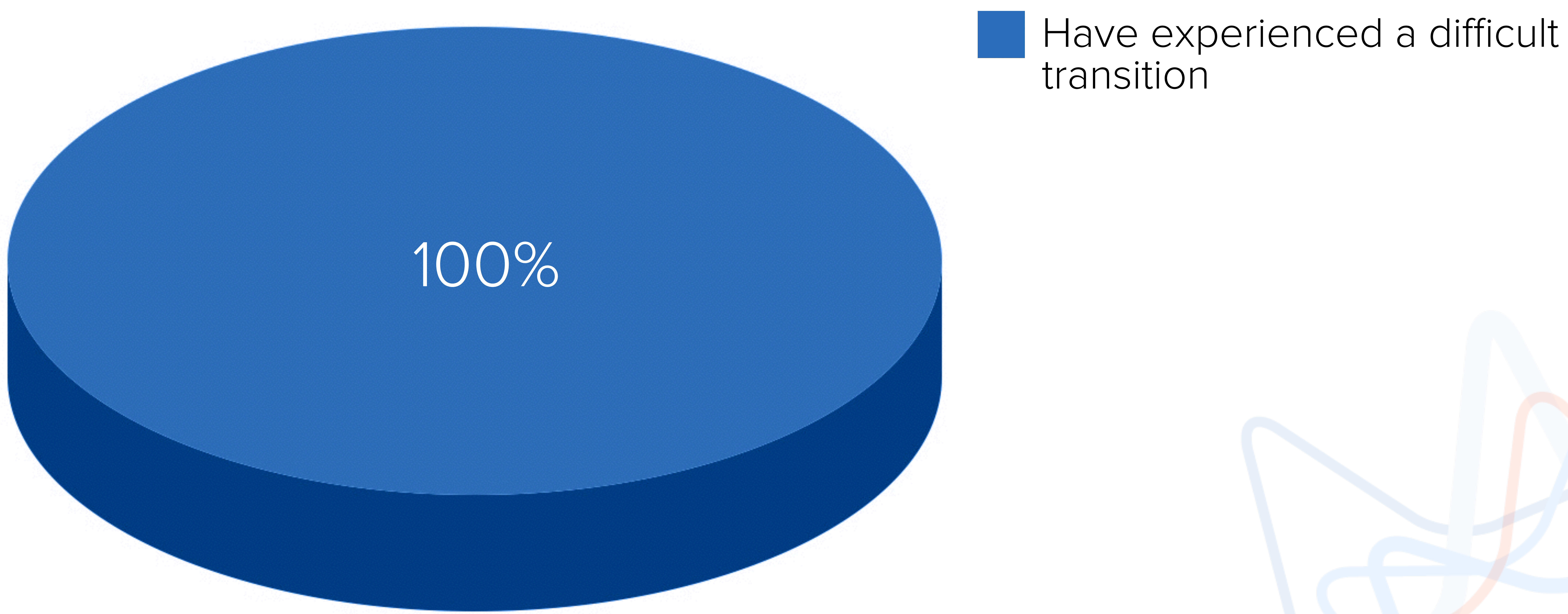
100%
Have experienced a difficult transition

Why should you care?

(or is this going to be a complete waste of your time?)

You will lose:

- Clients
- Team members
- Money
- Self Respect

This dynamic is the #1 reason why good agencies succeed or fail to thrive.

- More importantly, can this kind of company be successful at scale?


UNDERGROUND
MIND THE GAP

What Sales Needs

What Sales Needs:

- To sell & to win
- Technical oversight
- Feedback


B. Rich
HEDGEYE
What PM Needs

What PM Needs:

- Projects
- Realistic client expectations set
- Full debrief with project handover
- Resource availability

Client Perspective

Client Perspective:

- Needs to be able to plan their business
- Clear communication
- Wants to feel heard
- Want continuity in the hand-off

How to do a Hand-off (don’t drop the baton!)

Critical Transition Tools =

Communication + Process!

Communication

PROCESS OVERVIEW

1. Alert team / set hand-off expectations with the client
2. Handoff email + Project one sheet
3. Read handoff documentation
4. Plan resources for the project
5. Internal kickoff call
6. External kickoff call(s)

RESPONSIBILITY BREAKDOWN

Hand-off Process

Sales

- Alert team immediately
- Prepare hand-off documentation
- Prepare client with timeline of handoff
- Follow up with PM to ensure internal + client kickoff scheduled
- Attend kickoffs

PM

- Request or plan resources for quick project start
- Read & ensure team has read documentation
- Set up internal and client kickoff calls
- Coordinate any travel for on-site
- Prepare and share meetings agendas
- Attend kickoffs

HAND-OFF EMAIL

Hand-off Email

- Client Contacts - contact info and roles in the company
- Client DNA
- Reference Documentation (including reference to attached documents)
- Summary of project
- Known Risk Factors
- Actions and Responsibilities (Time-sensitive)

PROJECT ONE SHEET

Project One Sheet

- Client name
- Client industry
- Stakeholders/contact info
- Budget
- Timeline
- Quick overview
- Any other notes

Example Project Cover Sheet

Here's an example of what it should like like when filled in:

Client
RyanGosling.com
Client products / services
Media site with blog posts and Gosling siting photos
Project Title / description, high level
RyanGosling.com Site redesign
Client contacts **(name, e-mail, title)**
Eva Mendes, eva@ryangosling.com, CEO/Wife
Budget **(defining budget across our disciplines, not by phase)**
$50,000 Total $15,000 for UX $10,000 for Design $25,000 for Development
Client deadlines **(presentations, unavailability, projected launch date)**
Traveling and unavailable Nov. 15-30th. Important stakeholder meeting December 15th. Projected launch February 1.
Scope overview **(short and sweet. ex: D6 to D7 upgrade of product site with UX & UI redesign, e-commerce and migration)**
Redesign of current D7 site. Engagement strategy. Add ranking system to blog posts and cross promotion.
Other Notes
Anything else worth noting about this project.... Need to include all stakeholders in major decisions. Client may have funds for an add on project beginning in February.

INTERNAL KICK OFF

Meeting Agenda: Internal Kick Off

- Sales Overview
- Walk through project ‘one sheet’
- Q&A over documentation
- Discuss risks associated with project
- Prep for client kick-off
- Action items

CLIENT KICK OFF

Meeting Agenda: Client Kick Off

- Introductions
- Process overview
- Project overview
- Key stakeholders
- Timeline - important deadlines
- Budget
- Defining success
- Next steps

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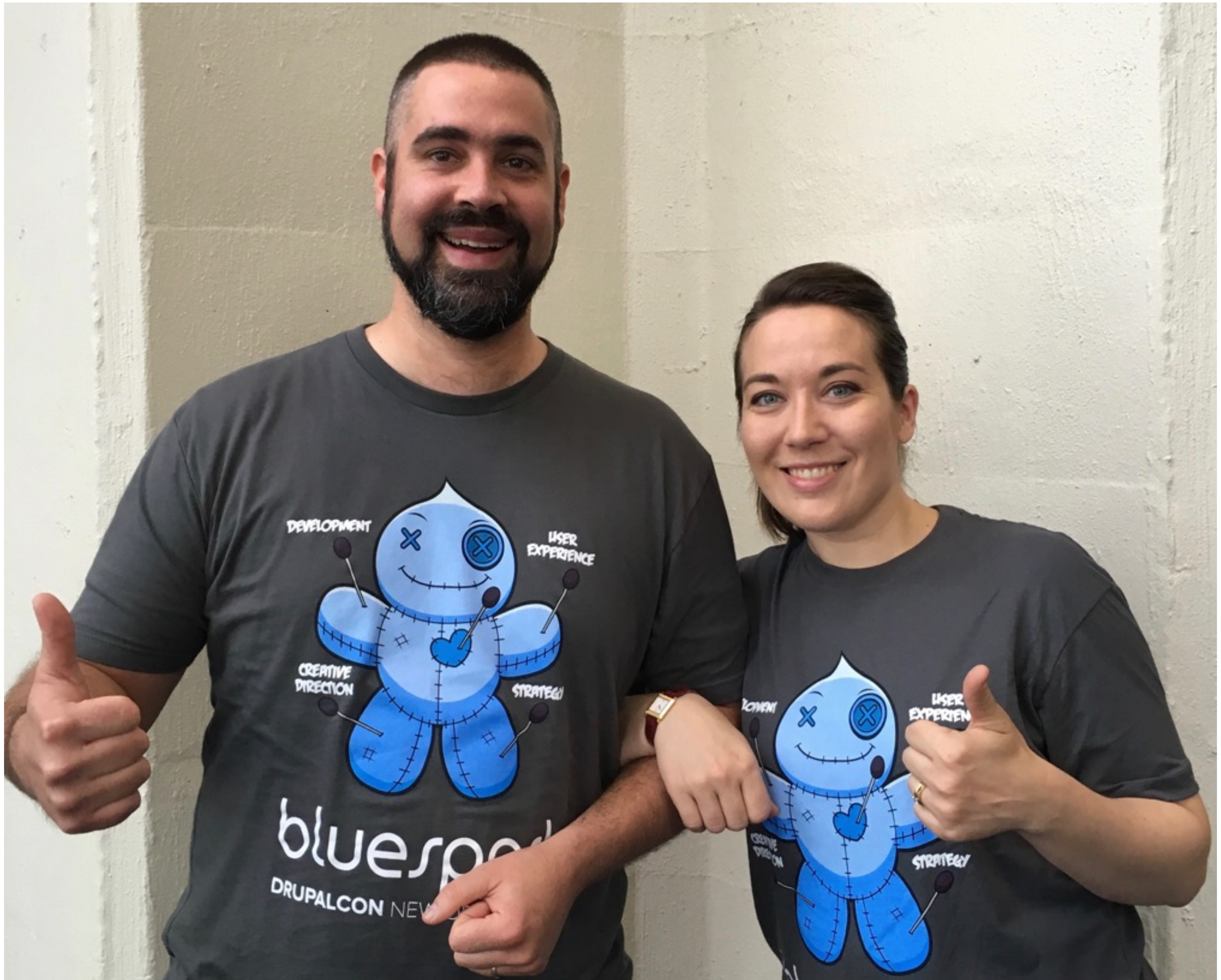

Thank you!

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NEW ORLEANS
DRUPALCON 2016

Join us for Sprints

Friday, May 13 at the Convention Center

First-Time Sprinter Workshop - 9am-12pm in Room 271-273
Mentored Core Sprint - 9am-6pm in Room 275-277
General Sprints - 9am-6pm in Room 278-282

NEW ORLEANS

DRUPALCON 2016

So How Was It? - Tell Us What You Think

Evaluate this session: http://tinyurl.com/j36efoc

Thanks!