

# ENGAGEMENT ENABLEMENT TASKS



## Key Activities

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| <ul style="list-style-type: none"> <li>• Needs Assessment</li> <li>• Client and opportunity management</li> <li>• Attend Leadership team meetings</li> </ul> | <ul style="list-style-type: none"> <li>• HR / Staffing</li> <li>• Admin / Equipment</li> <li>• Financial / Project charge set-up</li> </ul> | <ul style="list-style-type: none"> <li>• Complete proposal / approach doc</li> <li>• Identify quality measures</li> <li>• Create contracts / arrangements</li> </ul> | <ul style="list-style-type: none"> <li>• HR / Staffing</li> <li>• Admin / Equipment</li> <li>• Financial / Job charge set-up</li> </ul> | <ul style="list-style-type: none"> <li>• Schedule and conduct periodic quality reviews</li> <li>• Ensure accurate and timely billing</li> </ul> | <ul style="list-style-type: none"> <li>• Final billing</li> <li>• Admin / Equipment</li> <li>• Late charges</li> </ul> |
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## Key Tools

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| <ul style="list-style-type: none"> <li>• Client initiated RFPs</li> <li>• Resources Lead Database</li> <li>• Management Reports</li> </ul> | <ul style="list-style-type: none"> <li>• Resource request forms</li> <li>• Staffing database / resource management tools</li> </ul> | <ul style="list-style-type: none"> <li>• Proposal / approach templates</li> <li>• Contract / Arrangement templates</li> <li>• Pricing models</li> </ul> | <ul style="list-style-type: none"> <li>• Resource request forms</li> <li>• Staffing database</li> <li>• Consultant CVs</li> </ul> | <ul style="list-style-type: none"> <li>• Quality Database and forms</li> <li>• Timesheet system</li> <li>• Job summary reports</li> <li>• Billing templates and invoicing requirements</li> </ul> | <ul style="list-style-type: none"> <li>• Equipment inventory</li> </ul> |
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## Subject Matter Contacts

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# TYPICAL ENGAGEMENT PHASES

