



The SBTC Project Management Process is designed to keep projects moving, and to define those projects well to maximize the quality of outcomes for clients. SBTC will typically provide recommendations based on experience and best-practice for equipment and processes, though clients are welcome to request alternative options.

### **SBTC's 10 Steps to a Good Project Outcome**

1. Project Identification
  - a. Projects start their lifecycle in a variety of ways
  - b. As a ticket from a single user that demands more resources than usual
  - c. As a ticket from a single user that is escalated to a project
  - d. A group of tickets (ie requesting training independently)
  - e. An e-mail or specific project request from an administrator
  - f. An action item from a meeting or other interaction with SBTC

2. Project Design
  - a. The Project Design phase is broken down into several parts
    - i. Needs Identification
    - ii. Data Collection
    - iii. Scope Definition
    - iv. Project Overview and Goals Creation
    - v. Client Agreement

*Suggestion for Clients: Be as specific about what you want as possible.*

3. Project Quotation
  - a. Most projects are quoted
  - b. Some projects are estimated, especially those of large or less certain scope, or that occur over a long time period
  - c. Some projects may be moved to a time & materials basis, if a client agrees. This is generally done for simple projects when rapid response for implementation is available.
  - d. Upon approval of quotation, projects are invoiced

*Suggestion for Clients: The project is now fixed. Any changes you ask for will be put into a new project, or in some instances, a project addendum. Multiple, small changes along the way are called "scope creep" and they are the most certain way to spoil an otherwise good project.*

4. Project Initial Payment
  - a. Payment terms appear on all quotes and estimates.
  - b. Projects under a certain amount will be actions without initial payment.
  - c. Most projects will require a payment of 100% of equipment cost + 50% of labor in advance. This is generally the majority of the project cost.
    - i. This term differs from many vendors. SBTC is a nonprofit organization, and as such, we do not attempt to maintain the liquid capital to loan clients the value of their projects. This also ensures that ownership of equipment is clear (since it has been paid by the client), in case funding issues arise during the course of the project.



5. Equipment Ordering

- a. Upon receipt of payment, equipment and other procurement ordering for the project begins.
- b. Equipment can vary significantly in its availability, and this depends on time of year, equipment type, and specific vendors.
- c. When equipment arrives, or firm shipment is confirmed, scheduling will begin.

*Suggestion for Clients: Everything takes longer than you think it should. Remember, there is no such thing as “too much” advance notice.*

6. Project Scheduling

- a. Projects are scheduled based on receipt of payment, and equipment availability.
- b. Projects are scheduled with priority given to members.
- c. Availability of some project teams, such as development, or structured wiring teams, may be booked multiple weeks out.

*Suggestion for Clients: Let us know about constraints or conflicts. Unfortunately, SBTC must charge for a trip, if you didn't tell us you were waxing the floors that day. We're happy to take local needs into account for scheduling, if we're informed about them.*

7. Project Implementation

- a. Work commences at the scheduled time.
- b. SBTC will attempt to keep clients well-informed of project progress.
- c. Rarely does work proceed precisely as planned, especially when dealing with physical projects such as cabling. Our teams are good at mitigating issues, but SBTC does not provide promissory timelines for project completion.

8. Final Tasks and Follow-Up

- a. Most projects end with either a final task, such as training, or follow-up support to iron out issues that could not be handled or foreseen during planning and implementation.
- b. Projects do not carry an implied warranty, though most of the manufacturer's equipment is warranted if purchased new. Extended equipment warranties can be purchased, generally for both new and refurbished equipment, if a client requests them.
- c. Projects do not carry an implication of perpetual, or ongoing, support without charge.
- d. Equipment and systems implemented by SBTC are, generally, assumed to be SBTC's responsibility to maintain in a support role as a part of membership. No management or maintenance functions are assumed for non-members.

9. Project Final Payment

- a. Upon completion of project deliverables, final payment will be expected.
- b. Follow-up support or similar trailing items may not be finished or fully utilized when projects are billed. Payment is still expected, and the project deliverables have been provided.

10. Project Completion

- a. Your project is complete, congratulations.
- b. This may have been the first of many phases of a larger initiative. Each phase or other segment will be handled as its own unique project.