

# Methods and Procedures

## Website Optimization Services

(Global DesignIT process for outsourcing services to vendors)

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# Process for Global DesignIT doing business with vendors

## Overview

Global DesignIT (GDIT) interacts with vendors when necessary to accommodate client's needs in website, technical writing or documentation. GDIT is committed to stay focused on the products and services to stay up with today's technology. Rather than changing direction, we outsource the service and/or products. For example, we design corporate t-shirts and project manage the workflow to ensure timelines and requirements are met. We do not print the t-shirts here so we outsource the product. This document will outline the steps for products. One more scenario is optimizing websites. Customers may desire this service while we are building their website. Since it is so closely related to our business, we out source this services.

There are 3 scenarios for this process:

1. GDIT decides to provide service under GDIT
2. GDIT decides to outsource the service by recommending vendor to client and GDIT takes a fee for referral
3. GDIT decides to outsource with no fee or liability to either party

This document is intended to layout the process for situations like these as well as potential future vendors with similar services.

## Purpose

There are many factors that need to be taken into account when vendors are utilized. The purpose of this document is to outline the roles and responsibilities and process for GDIT employees, contractors and sub-contractors when dealing with outsourcing companies and vendors

# Website Optimization Process

## Step 1 – Client Requests Website Optimization Service

Entry Criteria	Exit Criteria
GDIT is notified that client is requesting website optimization service.	Director is notified via phone or email of potential new client

Request may come in various forms; email, phone, referral, networking or walk-ins.

## Step 2 – Analysis and Requirement Gathering

Entry Criteria	Exit Criteria
Client consultation	Requirements obtained. Fills out CARG Form

Project Manager notifies Director and responds to client immediately and attempts to get client request and requirements. Utilizes standard form "Client Analysis and Requirements Gathering Form"

## Step 3 – Internal Approval Process to Accept Service

Entry Criteria	Exit Criteria
Receives GARG Form	Determines resources and budget
Establishes direction GDIT will take with client	Notifies GDIT PM or analyst

Based on standardized factors (level of effort, magnitude of projects...place holder)

- If approved, continue to the next step
- If denied, GDIT arranges vendor and client match. Vendor provides standard fee to GDIT for referral, refer to document "Global DesignIT Vendor Fees for Products and Services".

## Step 4 – Enters Client Information in GDIT Database

Proprietary Information

Entry Criteria	Exit Criteria
Client information is received	Client/contact record in database

- If new customer add new client profile
- If existing customer, update client information
- If not continuing with service, continue to enter client information with status “N/A”

GDIT’s policy is to obtain a record of all clients and contacts for billing, project services and auditing purposes

### Step 5 – Onsite Client Consultation

Entry Criteria	Exit Criteria
Presenter must have an action plan and be knowledgeable of purpose of meeting (internal pre-meeting is required if director is will not be present at client meeting	Communicate client expectations Notes

During meeting, final requirements are gathered. (so far a phone call has transpired between GDIT and the client). All information and requirements may have been gathered at initial phone call but not likely. Either way, the following occurs at client site meeting:

- Define and confirm requirements
- Timeline
- Inform client you are there for information gathering and providing information. Under no circumstances is there a final commitment until the proposal is provided
- Under no circumstances do you provide a dollar amount or estimate
- Representatives are representing GDIT and are required to uphold GDIT values while at client meeting
- Inform client upon approval of proposal, a 30% (percentage is based on work being performed, see “[Client Initial Down-payment Chart](#)”) initial payment is required
- Client will be provided a contract outlining scope of work

### Step 6 – GDIT and Vendor Create Proposal for Client

Proprietary Information

Entry Criteria	Exit Criteria
Review and finalize proposal with vendor	Provide proposal to client

A timeline must be communicated to the client and adhered to as promised.

#### Step 7 – Client Approval to Perform Work

If Yes, client is provided documents mentioned in step 5.

If No, attempts to work with client until resolution is determined

#### Step 8 – Performs Work within Established Timelines

Entry Criteria	Exit Criteria
Client approval to continue	Internal approval from GDIT to vendor to continue with work

Testing is performed by developer as well as GDIT

#### Step 9 – Notifies Client to Perform User Acceptance Testing

Entry Criteria	Exit Criteria
Internal testing and bugs must be resolved before	Approval from client

GDIT works with vendor until Client approves development

#### Step 10 – Final Payment is Due

Entry Criteria	Exit Criteria
Client approval to continue	Sends client final invoice

**Step 10.1 - GDIT sends client final invoice**

**Step 10.2 - Updates GDIT database to 'completed' status**

**Step 11 – Lessons Learned and Standard One month Follow up with client**

Entry Criteria	Exit Criteria
Client database is updated with service results	Internal meeting of lessons learned and potential process improvements

**Step 10.2 – Appropriate documents are updated to reflect change process**

GDIT plans on having a standardized change process in place in the future. Currently because of the size of projects and resources our focus is on established the policies and procedures. At that time a change management process will follow.