

## Business Process

### Introduction

This document describes how you can expect Productive IT to handle your consultancy and development requirements. We hope that it will help us to work efficiently with you and your company by clarifying the roles and responsibilities of those involved in the process.

### How Relevant is this Document?

The relevance of this document will depend upon your enquiry as shown in the following table.

Project / Product	Document Relevance
Custom solution consultancy and development	Entire document is relevant
Customisation of one of our products	Only some parts of this document are relevant (please call for details)
Purchase of one of our products without any customisation	This document is not relevant

### Stage 1: Enquiry

- When you first contact Productive IT we will ask you for some basic contact information and discuss the general nature of your enquiry.
- We will then send or email to you an Enquiry Pack that provides basic information about Productive IT and a copy of our standard current terms and conditions, along with our contact details.

### Stage 2: Initial Consultation

- If you wish to proceed, an initial consultation will be carried out free of charge\* by phone or in person, to enable us to collect relevant details about your organisation and your requirements. This is essential if we are to have a clear understanding of your requirements and the context in which we will be working together.
- The purpose of the initial meeting is to:
  - Understand the (current and future) processes involved in your business
  - Help you to prioritise different aspects of developing your solution(s)
  - Make some suggestions about functionality and usability of the proposed solution(s)
  - Look at your current solution(s) [if any]
  - Demonstrate some of our own solutions
  - Show you what you might expect to see in your Outline Proposal and Specification documents
  - Discuss budgets, timeframes and how we would work together
- During the initial consultation, we will offer to prepare an Outline Proposal that sets out proposed course(s) of action and includes all the main details identified during the initial consultation.
- \*The initial consultation is free of charge if you are located within the M25; otherwise it will be charged at the reduced rate of £199 plus reasonable travel costs + VAT.

### **Stage 3: Outline Proposal**

- The Outline Proposal is a detailed document that usually takes between 1 and 2 days to write. It is available at the reduced rate of £199 + VAT (this is approximately 1/5 of our standard daily rate for a two day report).
- An Outline Proposal will address some or all of the following issues:
  - An overview of your business
  - Outline requirements from a business perspective
  - Outline requirements from an IT perspective
  - A review of the appropriate technological options (including remote access if applicable)
  - A summary of the existing solutions(s)
  - Benefits & ROI to be gained by development (e.g. time saving, cost saving, increased sales potential, new functionality, enhanced management reporting, security etc).
  - Look and feel
  - Consultancy brief (main issues for consideration during the consultancy)
  - The proposed database (structure)
  - The proposed database (functionality)
  - Time and cost estimates for each phase (project definition & design, development, reviews, import of data, deployment, training etc.)
  - Project phases
  - Project management issues
  - Deliverables
  - Change control
  - Testing
  - Support
  - Review
- The Outline Proposal will usually suggest an initial Project Definition and Design stage, to be followed by one or more Development stages, Deployment, and optionally Training and Support. Each stage will generally be billable, but you are not committed to any of them unless you wish to proceed.
- Subject to any necessary clarification of the Outline Proposal, you can proceed to Project Definition and Design by signing and returning one copy of the Outline Proposal to us with an official purchase order and a cheque for 50% of the cost of the Project Definition and Design stage. The balance will be invoiced on completion and submission of our Detailed Project Proposal.

### **Stage 4: Project Definition and Design**

- During the Project Definition and Design stage our development team, led by an experienced Project Analyst, will work with you and your staff to produce a detailed project Specification. This will identify all the objectives of the project and set out a programme of phased development work, testing, installation etc, as above. In the case of a complex project it may identify the need for additional analysis and research prior to development in some areas.
- The Specification will also identify possible avenues for future development and specify areas that are specifically excluded from the project.
- The Specification will also indicate how development is likely to be phased, with milestones and payment schedules based on estimates of costs and timescales.
- Development will proceed subject to a cheque or purchase order from you covering the work and a deposit payment for 50% of the value of the project or phase.

### **Stage 5: Development**

- Before starting development work, our development team will produce a Build Plan – an internal document that identifies all the tasks and activities involved in each phase of development. Any problems at this stage will be referred to you and resolved – if necessary with modifications to the plan.
- Please ensure that you have nominated staff in each department (as appropriate) to deal with specific development queries and let us have this list of contacts.
- Development may continue through several phases until it is complete, according to the plan. Each phase represents a milestone at which billing may or may not take place, as outlined in the Specification.
- Regular meetings will be held with you during the Development process, and certainly at the end of agreed phases, to ensure that you are happy with the work and to identify any necessary changes.

### **Stage 6: Change Control**

- It can happen that changes have to be made to the Specification during development, perhaps as a result of identifying additional features or from the reactions of potential users. Any such changes are dealt with through the use of a clear system of written approvals to ensure that the financial and timescale implications of any change-request are taken fully into account.

### **Stage 7: Testing**

- Pre-delivery testing takes place throughout the development period. Once a project has finished its development phase it will always be tested internally by someone other than its primary developer.

### **Stage 8: Deployment**

- Deployment of a finished solution may involve a number of things, including migration of your existing data and installation on your network. Unless expressly included in the Specification, we will not generally be responsible for modifications to your internal systems, hardware, software or network.

### **Stage 9: Free Support Period**

- Following deployment there will be an agreed period (usually 14 days) of free support during which any difficulties or 'bugs' (defined as instances where the solution does not match the Specification or does not 'perform as advertised') will be corrected free of charge.
- This 14 day period is for you to inform us of these difficulties and we will also attempt to adjust them within the same period. However, subject to the work involved, some difficulties may take longer to adjust.
- You can of course also request changes beyond the agreed specification, but these will be quoted for and charged on an hourly or daily rate basis as appropriate.

### **Stage 10: Training**

- Many solutions will require an element of training – either in the use of the solution itself, or required integration technologies. Training requirements will have to be identified in the Specification.
- Training is essential for most users to get the best out of the systems we have designed. It is usually sensible to have an initial training session early on to ensure that the correct usage practices are in place, followed by a reminder course some months later.

### **Stage 11: Completion**

- Project completion takes place once the solution has been deployed successfully and any difficulties have been adjusted. Completion may take place before or after training.

### **Stage 12: User Documentation**

- Documentation (to help users of the solution) is optional and is not included by default. It will only be produced and charged if you require it.
- Documentation time may have been identified during the Specification stage and the time allocated for it will have been allowed for in costing.
- Please note that the production of good documentation can take as much time as the development itself!

### **Stage 13: Support**

- Following the free support period, you may wish to take advantage of a Support Level Agreement (SLA). This entitles you to email, telephone, dial-in or on-site support for a defined amount of time each month.
- An SLA gives you:
  - Priority over other support demands.
  - Better value for money
- Some support issues can be solved much faster and with greater efficiency if we are able to dial-in to your systems. We may therefore ask you to deploy a remote access application such as Timbuktu or PC Anywhere as well as a modem and telephone service connection to the appropriate PC's.

### **Stage 14: Review**

- When your project has been completed, we may ask you to complete a standard Review Questionnaire.
- Unless otherwise requested by you in writing, we reserve the right to use your company name / logo and your project as a case study and as part of our advertising.

Productive IT (UK) Ltd.  
75 The Campions, Borehamwood, Hertfordshire WD6 5QG  
T: 0845 128 4020  
E: [info@productiveit.co.uk](mailto:info@productiveit.co.uk)  
W: [www.prouctiveit.co.uk](http://www.prouctiveit.co.uk)

Productive IT (UK) Ltd., Incorporated in England, 2002, No. 4548932. Registered office as above.