Project Delivery Framework: Connect

ISG

CRM

Input Opportunity

Go/No-Go

Proposal + Fee Development

Win!

CONNECT GOALS

- Build Relationships
- Establish Connection + Earn Work
- Confirm Client Expectations

ESTABLISH + GROW CLIENT RELATIONSHIP

PRACTICE GROUP LEADERS

bit.ly/PG_Structure

BUSINESS UNIT LEADERS

bit.ly/BU_Structure

RECEIVE PURSUIT

Incoming Project Opportunity

All pursuits must be entered in as an Opportunity in the CRM. This will be required to create a project number.

Client Discovery

bit.ly/ClientDiscoveryVideos_ISG

GO/NO-GO

Updated Go/No-Go Process

Business Unit Leader +
Geographic Leader +
Practice Group Leaders

As Needed

Upload your pursuit documents to the opportunity record (i.e. RFP, email correspondence, SOW, etc.).

To submit a go/no-go request and receive input from BU and PG leadership, **change the Opportunity Stage to "Go/No-Go" in the CRM, go to the "Forms" section, and complete the "Go/No Go Request" form.** When you submit the request, an email will auto-generate.

VET PROJECT

Pursuit Vetting

- **Client Relationship** - Do we have an existing relationship with this client or knew this opportunity was coming forth?
- **Client Communication** - What do we need to learn from the client that we don't know or understand from the RFP/RFQ?
- **Strategic Reasons to Pursue** - What are the long-range plans for this business unit, geography, or client relationship to consider?
- **Preliminary Fee Discussion** - Can we win this project with our fee expectations?
- **Preliminary Schedule Discussion** - Does the schedule align with our project workload?
- **Identify the Competition** - Do we have a unique advantage over our competition?
- **Unique Differentiators** - Do we know what it takes to win and can we offer that?
- **Committed Proposal Team** - Do we have a team that can assemble the proposal to win?
- **Identify Deal Breakers** - Is there anything about this client or pursuit that would cause us to walk away?

GO

Assign Pursuit Lead + Assemble Proposal Technical Team

Business Unit Leader/support, Project Leader, and other design team members to assist with proposal needs.

NO-GO

Contact Marketing for "Thank You" Correspondence Request, if Applicable

PROPOSAL PREPARATION

ISG Preferred Option

BY MARKETING

Updated Fee + Proposal Development Process

To request fee input from BU and PG leadership and prompt proposal development, **change the Opportunity Stage to "Proposal Development" in the CRM, go to the "Forms" section, and complete the the "Fee + Proposal Development Request" form.** When you save, an email will auto-generate.

BY PURSUIT LEAD

If the ISG Preferred Option to the left is circumvented, please follow the steps below:

- REQUIRED: Use proposal templates located here: *\\isgfile1\Shared\Project Delivery\04 Templates\02 Word\Letter Proposal*
- REQUIRED: Include Terms and Conditions in the proposal per the template
- REQUIRED: Email proposal to Kelsey.Ashburn@ISGInc.com for peer review prior to sending to client
- REQUIRED: Email final proposal to the Business Unit Leader for peer review prior to sending to the client
- Save supplemental proposal information in the Opportunity record in the CRM

PROPOSAL REQUEST SUBMITTAL

Provide RFP/RFQ submission details along with proposal contributors and attachments

If Available

Select Business Unit and Practice Groups that are included in the pursuit and project details. A request for input on scope and fee expectation will be sent to the appropriate Business Unit Leader and Practice Group Leaders.

PROPOSAL KICKOFF MEETING

Led by Marketing Lead with attendees identified by Pursuit Lead

- Marketing to set up Teams page
- Coordinate information gathering

Prepare Proposal

TECHNICAL TEAM

Provide necessary technical information

Provide

- Approach
- Fee
- Methodology
- Schedule
- Scope
- Team Details
- Technical Information
- Understanding
- Related Project Experience
- Previous Precedent Proposals

MARKETING TEAM

Lead proposal writing and assembly

Provide

- Approach
- Branding + Graphics
- Client Research, Language, and Goals
- Firm/Team Related Content
- Methodology
- Multi-Disciplinary Services
- Overall Layout
- Supplemental Information
- Value Added

DRAFT REVIEW

Marketing, Pursuit Lead, and Technical Team Bluebeam review

PROPOSAL SUBMITTAL

Pursuit Lead to submit the proposal and verify receipt. Pursuit Lead to track outcome and follow-up within one week of the submission.

PROJECT AWARD TO ISG

- **Update Stage to "Win!" The BU support specialist will be automatically alerted, connect with the opportunity leader, convert the opportunity to Unanet AE, and create project number or tie to an existing project number.**
- Update CRM opportunity data if needed
- Execute project contract

ESTABLISH PROJECT LEADER

- Engage Pursuit Lead and Business Unit Leader

To request a Project Leader if not assigned, click on the link below:

Project Leader Request

BEFORE YOU MOVE ON

Have you met all of the Connect goals?

Project Delivery Framework: Align

ISG

ALIGN GOALS

- Identify Project Team + Project Strategy
- Review Client Expectations
- Develop Success Criteria + Project Plan

PROJECT VISION + GOALS

Use our Project Work Plan
bit.ly/TeamsWorkPlan_ISG

CRM

WHAT IS GUIDING THE PROJECT?

- Establish ISG success criteria
- Establish client success criteria based on client discovery meeting
- Project Leader to collaborate with Business Unit Leader and Pursuit Lead

IDENTIFY PROJECT RISKS

WHAT ARE THE KNOWN RISKS?

- Assist in planning and what ISG can control
- Prepare team for known challenges ahead

ESTABLISH PROJECT TEAM

TEAM GOALS

- Be clear on project and phase goals
- Understand proposed project durations
- Sign proposal; provide budget clarifications
- Establish team members needed at each phase

INTERNAL TEAM KICKOFF

TEAM ASSEMBLY

Updated Project Team Assembly Process

To request team assembly input from BU and PG leadership, **change the Opportunity Stage to "WIN" in the CRM, go to the "Forms" section, and complete the "Win: Team Assembly Request" form.** When you save, an email will auto-generate to the PG leadership team assigned to that BU.

Team Assembly

REVIEW + SET PROJECT EXPECTATIONS

- Review client goals and align on internal project goals
- Establish accountability and communication plan
- Business Unit Leader and Pursuit Leader to share information gathered during Connect phase

MILESTONE PLAN

Project Leader + Practice Group

- **Project Leader** - Organize meeting(s) to develop milestone planning meeting Identify key client dates
- **Practice Group** - Identify needs, decision points, project hand-off points, or major collaborator events
- Establish known decision points
- Plan quality assurance/quality control
- Review and ensure budget aligns with the plan

Reference Logic Based Planning
bit.ly/LPSTraining_ISG

How to Update Project Schedule in Unanet
bit.ly/Unanet_ProjectScheduleManagement

BEFORE YOU MOVE ON
Have you met all of the Align goals?

Project Delivery Framework: Deliver

ISG

CRM

DELIVER GOALS

- Facilitate + Lead Project Plan
- Execute Solution
- Exceed Client Expectations

CLIENT COMMUNICATION KICKOFF

GOALS

- Introduce key team members
- Establish roles and responsibility
- Align team with communication plan
- Provide framework of schedule and decision points
- Align and confirm expectations
- Review risks

DEVELOP SOLUTION

BEST PRACTICES

- Establish phase goals (by Practice Groups)
- Ensure client is informed and able to make educated decisions
- Provide updates at the end of each design phase (by Practice Groups)
- Ensure team and work aligns with project goals
- Develop informal project debrief of items to address during project closeout

FACILITATE + LEAD PROJECT PLAN

During this phase, the work plan is reviewed, modified, and implemented. Ensure the plan can adapt as needed throughout the design.

- Review summary page internally and externally
- Modify overall plan, as needed
- Include additional project information as identified throughout the project phases
- Document changes made by internal and external project members in Tab 06 to ensure accountability

FACILITATE PROJECT PLAN THROUGHOUT THE DESIGN PROCESS

PROJECT PULSE MEETINGS + REPORTING

- Report new project challenges
- Evaluate status of decision points
- Complete informal and formal reports (two-week look ahead informal; four to six week look ahead formal)
- Review work plan with internal team (Project Leader accountable to keep this updated)
- Review summary page of work plan with external team (identify frequency and specific needs with client)

ISG PROJECT BUDGET REVIEWS
Design Fees

- Project Leader to review and inform Practice Group of changes
- Identify areas of excess scope and/or budget
- Perform weekly progress verses effort reviews and monthly overview check-ins

PROJECT BUDGET
Construction Budget + Cost Estimate

- Assign team member to complete task
- Ensure format aligns with total project costs
- Establish phase accuracy
- Provide client with updates, as needed

PROJECT QUALITY ASSURANCE/ QUALITY CONTROL

- Establish timeline
- Assign accountable parties by Practice Group
- Establish external review needs
  - » No major reviews past design development completion to encourage scope changes

Confirm Goals Are Met

DELIVER SOLUTION

MARKETING OPPORTUNITIES

- Groundbreaking
- Topping Off
- Site Signage
- Campaign: construction website, social media, press release, etc.

(Marketing RoboHead request to start conversation)

CONSTRUCTION

TRANSITION + BID

- Update newly assigned team member on project and transition relationships
- Lead bidding activity and coordination activities
- Establish roles and communication points through construction administration process (internal and external)

CONSTRUCTION ADMINISTRATION PROCESS

- Define and realign expectations for ISG's involvement
- Establish communication plan with the team (submittals, RFIs, site visits, or other expectations)
- Collaborate with Practice Group leaders for team visit schedule
- Provide project status updates to Practice Groups
- Create punch-list and include Practice Groups
- Update client on project status and information in collaboration with Business Unit leader
- Collaborate with internal and external teams for site tours

Reference Construction Administration Process

bit.ly/CA_FileStructureGuide_ISG

BEFORE YOU MOVE ON

Have you met all of the Deliver goals?

Project Delivery Framework: Debrief

ISG

DEBRIEF GOALS

- Strengthen Relationships
- Learn from Challenges + Accomplishments
- Foster Continuous Improvements

PROJECT CLOSEOUT

MARKETING OPPORTUNITIES

- Obtain client reference and quote
- Discuss project award submission potential
- Discover opportunities to present project at events
- Gather data points for GIS tracking
- Schedule professional photos

DESIGN PHASE CLOSEOUT

- Client survey to build relationships
- Conduct internal survey and project debrief call with Client and internal team
- Document important project information in CRM

CONSTRUCTION PHASE CLOSEOUT

- Understand project challenges from construction team
- Document important project information in CRM

POST-CONSTRUCTION

ACTIVITIES

- Coordinate site visit evaluation attendees with Business Unit leader, if necessary for project
- Establish site visit outcomes
- Document important project information in CRM

CRM

Update

Closeout

PATH TO CONTINUOUS IMPROVEMENT

Have you met all of the Debrief goals?