

BPO Strategic Planning - Professional Service Co-ordination checklist

- 1 Needs analysis (summary definition of what is required < 50 words)**
 - identify issues within strategic areas
 - upload details of all required planning documents into rdbase

- 2 Identification of qualified professionals,**
Firm Individual contact info. links to relevant articles
 - review potential professionals with client

- 3 Co-ordinate services with professionals**
 - Forward information in step 1 to qualified professionals (step 2)
 - Assist in compiling additional info. via BPO

- 4 Clarify deliverables,**
Written engagement letter outlining:
 - deliverables
 - completion date &
 - fees

- 5 Ensure complete documentation uploaded to BPO**
 - Review of completed deliverables
 - follow-up with client on implications to business

- 6 Assess impact of this work on other strategic areas**
 - Provide feedback on any perceived implications to other strategic areas