

# Business Development project setup

## Checklist

Use this checklist as a quick way of ensuring that you perform the significant steps of setting up a project for your business development effort.

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|  | <b>1. Set up the project, being sure to complete the following fields:</b>  |
|  | <ul style="list-style-type: none"> <li>For the status (Project Info tab &gt; General subtab), select <b>Active</b> or <b>Preliminary</b>.</li> </ul>  |
|  | <ul style="list-style-type: none"> <li>Description (Project Info tab &gt; General subtab)</li> </ul>  |
|  | <ul style="list-style-type: none"> <li>Billing Type (Project Info tab &gt; Billing subtab)</li> </ul>   |
|  | <ul style="list-style-type: none"> <li>Rate Table (Project Info tab &gt; Billing subtab)<br/>Select a Business Development rate table if you set one up.</li> </ul>   |
|  | <ul style="list-style-type: none"> <li>Client (Project Info tab &gt; Invoice subtab)</li> </ul>   |
|  | <ul style="list-style-type: none"> <li>Invoice Format (Project Info &gt; Invoice subtab)</li> </ul>   |
|  | <b>2. Set up a new phase titled Business Development, being sure to do the following:</b>   |
|  | <ul style="list-style-type: none"> <li>For the Status field (Project Info tab &gt; General subtab), select <b>Marketing</b>.<br/>Ajera forces the Billing Type to be Marketing.<br/>Ajera displays a Business Development subtab.</li> </ul>          |
|  | <ul style="list-style-type: none"> <li>Enter a percent chance of winning (Project Info &gt; Business Development subtab &gt; Marketing Info subtab).</li> </ul>   |
|  | <ul style="list-style-type: none"> <li>Start at least one stage (Project Info &gt; Business Development subtab &gt; Stages subtab).</li> </ul>  |
|  | <ul style="list-style-type: none"> <li>Be sure to enter a final disposition when one is reached.</li> </ul>   |
|  | <b>3. Set up a real phase (production phase), being sure to do the following:</b>   |
|  | <ul style="list-style-type: none"> <li>In the Status field (Project Info tab &gt; General subtab), select <b>Work Hold</b>. This prevents time from being entered inadvertently. As another option, you could select <b>Preliminary</b>.</li> </ul>   |
|  | <ul style="list-style-type: none"> <li>In the Marketing Phase field (Project Info tab &gt; General subtab), select the Business Development phase.</li> </ul>   |
|  | <ul style="list-style-type: none"> <li>On the Manage tab, enter a contract amount for this phase.</li> </ul>  |
|  | <ul style="list-style-type: none"> <li>On the Manage tab, enter estimated start and completion dates for this phase.</li> </ul>   |
|  | <b>4. When you win the job, be sure to do the following:</b>  |
|  | <ul style="list-style-type: none"> <li>Go to the Business Development phase &gt; Project Info tab &gt; Business Development subtab &gt; Stages subtab. For the Final Disposition field, select Won. This changes the workload forecasting.</li> </ul> |
|  | <ul style="list-style-type: none"> <li>Change the status of the real phase to Active (Project Info tab &gt; General subtab).</li> </ul>   |
|  | <ul style="list-style-type: none"> <li>If needed, for the draft invoice, change the nonbillable WIP to Billable, as appropriate</li> </ul>  |