

Client Name:
Engagement/Project Name:
SDM Name:
Consultant Name:
Initiation Date:

Responsible	Process Reference	Activity	Yes	No	N/A
Finalise Service Delivery Arrangements					
SDM	5.3.1.1	Procurement Agreement Signed (including milestone billing schedule if relevant)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.1	Procurement Agreement Filed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.1	Consultant Agreement signed and filed (for new employees or sub-contract resources)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.1	Start Date Finalised with client	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.1	Consultant Allocated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.1	Client readiness confirmed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.1	'Inflight Engagements Summary' spreadsheet completed/updated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.1	Consultant Engagement Induction scheduled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.1	SDS, workplanning and status reporting expectations set	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.1	Engagement resources provided (templates, prior work, research)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.1	Purchase Order number obtained and sent to accounts receivable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.1	G:/ drive engagement folder structure created	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare for engagement					
SDM	5.3.1.2	Engagement induction materials provided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.2	Engagement induction meeting completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultant	5.3.1.2	Engagement preparation completed (independent research, procurement scope, client documentation, training, BABOK techniques, issue and risk identification etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultant	5.3.1.2	Engagement brainstorming session conducted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultant	5.3.1.2	Review and consolidate all preparation notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilitate Engagement Kickoff					
SDM	5.3.1.3	Engagement end date discussed and agreed:	[enter date]		
SDM	5.3.1.3	Fixed versus flexible end date discussed and agree	[fixed/flexible]		
SDM	5.3.1.3	Consultant pre-approved leave discussed and agreed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SDM	5.3.1.3	Leave process discussed and agreed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.3	Timesheeting process discussed and agreed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.3	Core working hours discussed and agreed:	[enter details]		
SDM	5.3.1.3	Confidentiality requirements discussed: • [specific details]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.3	Information security requirements: • [specific details]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.3	Workplanning process discussed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.3	Status reporting process discussed (time chargeable to client)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.3	Peer review process discussed and agreed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.3	Consultant support processes discussed (SDM 1-2-1 meetings, Practice Management meetings, PD sessions - time chargeable to client)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.3	Client Service review schedule agreed: • Initial: [typically 2 weeks after initiation] • Recurring: [Fortnightly / Monthly / No] • Midpoint: [Typically at half way] • Final: [Typically at closure]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.3	Client access pass received and checked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SDM	5.3.1.3	Network access details received and checked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Establish Engagement Scope					
Consultant	5.3.1.5	Scope workshop facilitated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultant	5.3.1.5	Engagement scope documented	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultant	5.3.1.5	Engagement scope peer reviewed by BAPL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultant	5.3.1.5	Engagement scope walkthrough completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultant	5.3.1.5	Engagement scope agreed in writing (client written endorsement should be filed in SDS folder)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Plan Engagement					
Consultant	5.3.1.6	Engagement planning and estimating completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultant	5.3.1.6	Engagement plan peer reviewed by BAPL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultant	5.3.1.6	Engagement plan walkthrough completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultant	5.3.1.6	Deliverable(s) peer review(s) scheduled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>