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**Client Engagement Process**

**Version History:**

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| --- | --- | --- | --- | --- | --- |
| **Ver.** | **Date** | **Description of Change** | **Author** | **Reviewed By** | **Approved By** |
| 0.1 | 10th May 2008 | First Draft | Ashwani Kumar |  | Sudhir Saxena |
| 1.0 | 4th June 2008 | Baselined& release | Ashwani Kumar | Sudhir Saxena | Sudhir Saxena |
| 1.0 | 13th April 2011 | Reviewed and changed process flow and tasks | Abhishek | Sudhir Saxena | Sudhir Saxena |
| 1.0.1 | 13th April 2013 | Update clause 8 in section 5.2 under PM/DM roles & responsibility | Rahul | Dhananjay | Dhananjay |
| 1.1 | 29thJuly 2015 | To meet the new requirement of ISO 27001:2013 clause update section 5.2 for security risk assessment | Rahul Raj | Dhananjay | Ajay Kumar Zalpuri |
| 1.2 | 16th May 22017 | Update section 6.1 and 7 for contract checklist | Rahul Raj | SEPG Team | Ajay Kumar Zalpuri |

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# 1. Purpose:

The purpose of this process is to thoroughly understand the scope of the project, and involve client for the scope baselining and proposal, SOW and change requests signoffs.

Client will put forward his requirement in the following ways:

* 1. Verbal
  2. Through Contract

1. Verbal:
   1. If it is verbal then Northshore will document the request and will send it across to the client for approval.
2. Through Contract:
   1. In this case if it is a Contract then it should be documented and approved by the client.

# 2. Entry Criteria:

* + 1. Statement of work
    2. Change Request.

1. Approved Project Proposal

# 3. Glossary:

**DM: -**Delivery Manager.

**PM: -**Project Manager.

**SOW: -** Statement of Work**.**

# 4. Input:

1 Statement of work

2. Change Request.

# 5. Roles &Responsibilities:

## 5.1 PM\DM Roles and Responsibilities

1. Will be responsible for Client Engagement process
2. Perform project risk assessments for information security
3. Will conduct the work in an efficient and expedient fashion.
4. Will deliver a clear, concise and professional deliverable as a result of this engagement.
5. Will furnish and supply all required equipment and help for Client Engagement.
6. Will assess, plan, design, test and implement appropriate software’s as per requirement of the project.
7. If needed PM\DM will appoint a contact person who will be a point of contact for the customer.
8. The PM shall prepare the checklist for the Go \No Go decision. It depends upon the location, if project start from SVAM then in that case it is not applicable but if any project starts from domestic then in that case it is required.

## 5.2Customer’s Responsibilities

1. Customer will provide North Shore with appropriate access to the network, facilities and personnel of the organization wherever needed.
2. Customer will provide cooperative access to knowledgeable staff that may be required during the examination phase of the project.
3. Customer will provide access to the appropriate decision-making authority during the process of determining the appropriate evaluation criteria for the project.
4. Prior to the delivery of any services defined in the Statement of Work, Proposal, the name and contact details of the primary contact from the client end mentioned in the proposal \ SOW will serve as a point of contact. This Point of Contact will be the person to whom all North Shore communications will be addressed and who has the authority to act for Customer in all aspects of the project.

# 6. Tasks:

## 6.1 Project Initiation

* + 1. The Delivery Manager\Project Manager starts with the understanding of the scope of the project.
    2. The delivery manager or Project manager starts the preparation of proposal document.
    3. The scope of Project should be properly understood and clearly stated in proposal document.
    4. Proposal should be reviewed by PM using contract review checklist.
    5. Develop and manage project/program schedules, scope and budgets including project approvals.
    6. Identifying and mitigating high level project/program risks.
    7. Maintaining continuous communication with the Customer.
    8. Ensure workspace facilities are available that includes a project team, work area etc.
    9. Conduct Project kickoff meeting by involving relevant stakeholders.
    10. Involve client for Scope clarification wherever needed.

## 6.2Project Change Requests

1. Project Manager Assign an Administrator to identify, schedule and confirm availability of support staff and management for on-site interviews and meetings.
2. Schedule meeting rooms as necessary as per agenda.
3. Project Manager administers that the Project Change process(Refer to Change Control Process under Configuration Management Process) is followed during the change request phase
4. Obtain and provide information, data, decisions and approvals, within 3 working days of North Shore’s request, unless both parties agree to an extended response time.
5. Project Manager along with the team resolve project issues, and escalate issues within customer’s organization wherever needed.
6. Project Manager monitors and reports project status on a regular basis with customer’s management by using Weekly reports \Monthly Reports

# 7. Output:

1. CK-10-CRC-Contract Review Checklist
2. Proposal approved by client
3. Project Change Request which will be used for communicating the change if required, which could be due to the following reasons :
   1. Mandatory changes to the project schedule which can’t be overlooked.
   2. Due to mandatory changes in the scope of the project.
   3. Non-availability of products, resources or services which are beyond North Shore’s control.

# 8. Validation:

1. Approved checklist
2. Approved SOW or Equivalent artifacts from the Client.
3. Approved Project Proposal

# 9. Exit Criteria:

* + Approved Project Proposal/SRS
  + Baselined Project Scope
  + Approved Change Request.