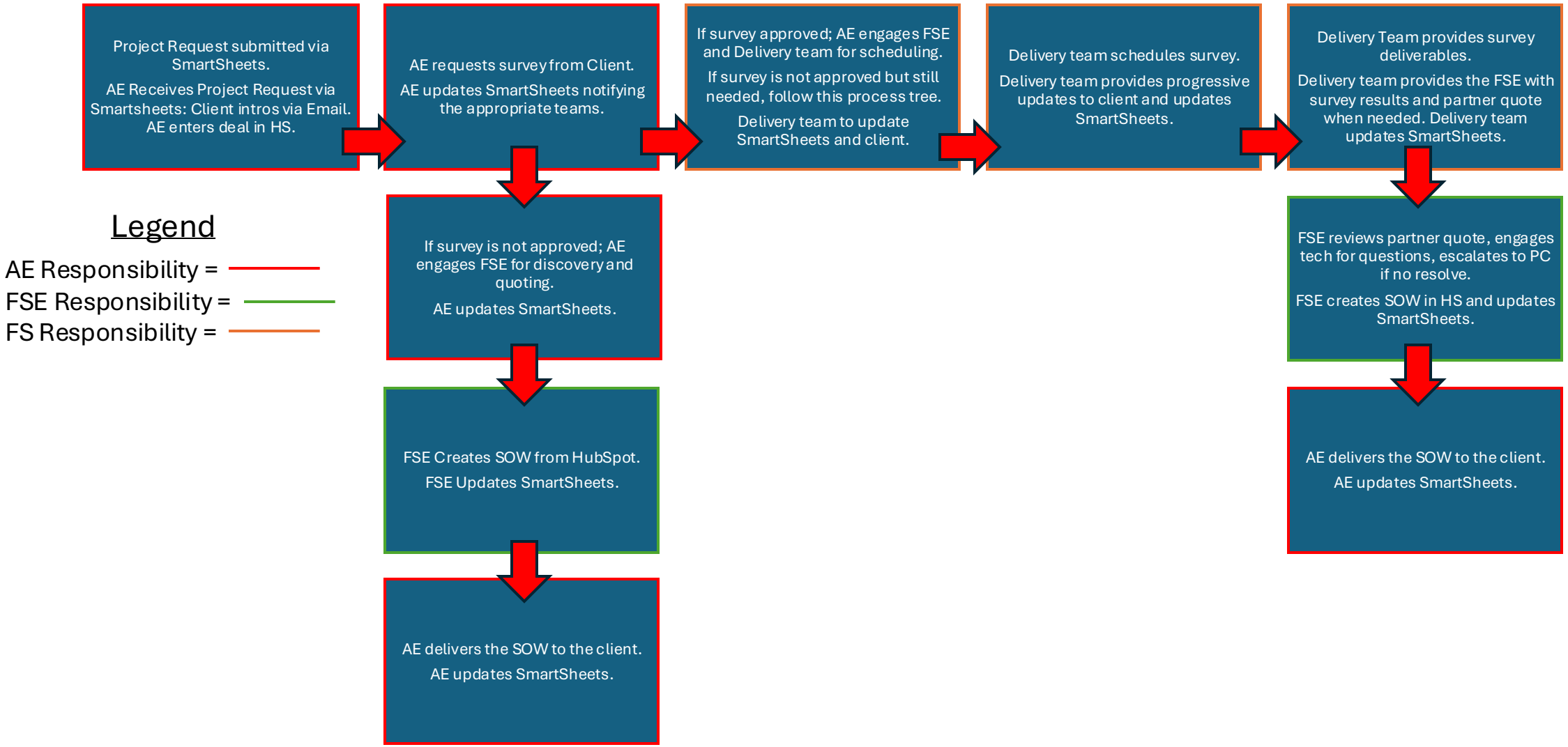
Project Request submitted via SmartSheets.
AE Receives Project Request via Smartsheets: Client intros via Email. AE enters deal in HS.
AE requests survey from Client.
AE updates SmartSheets notifying the appropriate teams.
If survey approved; AE engages FSE and Delivery team for scheduling.
If survey is not approved but still needed, follow this process tree.
Delivery team to update SmartSheets and client.
Delivery team schedules survey.
Delivery team provides progressive updates to client and updates SmartSheets.
Delivery Team provides survey deliverables.
Delivery team provides the FSE with survey results and partner quote when needed. Delivery team updates SmartSheets.
Legend
AE Responsibility =
FSE Responsibility =
FS Responsibility =
If survey is not approved; AE engages FSE for discovery and quoting.
AE updates SmartSheets.
FSE Creates SOW from HubSpot.
FSE Updates SmartSheets.
AE delivers the SOW to the client.
AE updates SmartSheets.
FSE reviews partner quote, engages tech for questions, escalates to PC if no resolve.
FSE creates SOW in HS and updates SmartSheets.
AE delivers the SOW to the client.
AE updates SmartSheets.