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**PROJECT BRIEF**

**Grantee Name (org & individual): Ashoka East Africa**

**Volunteer Name(s): Aprille Ibarra- Requino, Lorrenzo Martin Santos, Carol Anne Tragura**

**Customer #: 3523089 Ashoka**

**Account Manager Name: Charles Cave**

**Project Type (i.e. Dashboard): Simple Implementation**

**Part One: Background**

* What does your organization do and how do you do it?
	+ A global organization. Embedded of the global organization. Cover also Kenya. Small team. There is also in Manila. Leading change makers. Organizing leading entrepreneurs globally. Giving funds to entrepreneurs
	+ Used to use salesforce to track revenue (pipeline)
	+ Will be communicating on the finance side
	+ Track expenses
	+ Chart of accounts to match to revenue
	+ Use NetSuite more than the excel sheets used right now
	+ Greater ability
	+ Using spreadsheet
* What is your role within the organization?
	+ Simon Stumpf – Director of Ashoka East Africa
* How long have you used NetSuite – what do you use it for? (don’t assume they use the same instance of NS that you use)
	+ Washington DC used NetSuite but not East Africa
	+ Just used NetSuite for importing data
* Who else on your staff uses NetSuite?
	+ None in East Africa
* Contacts: Are there other decision makers for this project? Who will ensure this project is successful after the SuiteVolunteer program is over?
	+ Vicky Nyakundi

*Now, onto the SuiteVolunteer Project. Feel free to ask questions outside of these – The goal is to figure out everything you need to know in order to develop the scope of the project.*

**Part Two: Project Specifications**

* Describe what the project is that you were accepted for:
	+ Simple Implementation
* What are you hoping to achieve from this project?
	+ NetSuite Training - Basic overview of how the system works
	+ Ashoka doesn’t need much of NetSuite customization and modification. They would just like to have analysis of what are the company requirements and what are those that can be entered in NetSuite
* What challenge will this project help you overcome?
	+ More extensive reporting, monthly or weekly basis report
	+ Right now it is manually done
	+ Using so much time looking backwards
* What training or knowledge do you think you’ll need to use these deliverables?
	+ Training of NetSuite basic functionalities
* What is your expected outcome from this project (how would you define success)?
	+ To be able to utilize and successfully use NetSuite just like the Washington DC office
* Is there any field or nonprofit sector knowledge that I need to know to complete this project?
	+ None

**Part Three: Communication - Working Relationship**

* How do you like to share information? Email/Phone & Webex?
	+ Email is the most convenient means of communication aside from the scheduled sessions
* What is a good day/time for us to meet for check-ins?
	+ MW 2-4
* What time zone do you work in?
	+ GMT +3
* What is a reasonable amount of time for a reply (24-48 hours?)
	+ 1 day

*Parts 4 should be drafted by the volunteers after the call*

**Part Four: Scope – (i.e. What all parties agree will/will not be included in the project)**

*To be prepared after the call. Write this to the best of your abilities. Use the project template (in this packet) as an example of critical components. Know that this will likely shift during the project, that’s okay!*

**Define what is in Scope:**

* Familiarize grantee with NetSuite (Training Sessions) covering the following topics:
	+ *Recording Transactions*
	+ *Reports*
* Grantee will be using existing NetSuite account used by their Washington DC office and would be trained on how to use the system
* Be able to use NetSuite reporting to substitute their excel spreadsheets

**Define what is out of Scope**:

* Configuration of account
* Customization of forms
* Training on Data Migration
* Import/Creation of data
* Payroll Setup

**Outline Completion Criteria:**

* The project is complete once volunteers are able to cover all topics that are applicable for Ashoka
* Grantee should have a basic knowledge of NetSuite transactions and reports right after the project

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**Project Schedule**

**Example**

**TIMELINE/ DELIVERABLES**

|  |  |  |
| --- | --- | --- |
| ***Date*** | ***Responsible*** | ***Item*** |
| *05/15/2014* | *NetSuite Team* | *Introduction Call* |
| *5/21/2014* | *NetSuite Team* | *Data Gathering from Ashoka**Send Complete Project Brief with scope and Schedule* |
| *05/21/2014* | *Ashoka* | *Sign Off Project Brief* |
| *5/23/2014* | *Ashoka* | *Provide List of Transactions* |
| *05/26/2014* | *Ashoka & NetSuite Team* | *Training Session # 1* |
| *05/27/2014* | *Ashoka* | *Assignment from training #1* |
| *05/28/2014* | *Ashoka & NetSuite Team* | *Training Session #2* |
| *05/29/2014* | *Ashoka* | *Assignment from training #2* |
| *06/02/2014* | *Ashoka & NetSuite Team* | *Training Session #3* |
| *06/04/2014* | *Ashoka* | *Assignment from training #3* |
| *06/09/2014* | *Ashoka & NetSuite Team* | *Training Session #4* |
| *06/10/2014* | *Ashoka* | *Assignment from training #4* |
| *06/11/2014* | *Ashoka & NetSuite Team* | *Training Session #5* |
| *06/12/2014* | *Ashoka* | *Assignment from training #5* |
| *06/16/2014* | *Ashoka & NetSuite Team* | *Training Session #6* |
| *06/17/2014* | *Ashoka* | *Assignment from training #6* |
| *06/20/2014* | *Ashoka* | *Project Completion Sign Off* |