

# Bespoke Project Manager

## Document Version & History

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1.0	Sanu Sudhakaran	20th July 2023	Contributor

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## Role Tasks

### Scope

Would be responsible for the profitability, growth and happiness of employees and customers across the accounts being handled.

Each Project Manager is expected to work seamlessly with the rest of the colleagues for the overall growth of the organization.

### Customer Success

- Good Rapport with customers by having 1-2-1 meetings to get feedback and understand project milestones and overall customer growth.
  - Identify opportunities to upsell and provide pathways for the Sales Team to pitch in.
  - Gather feedback and make adequate corrections needed if any on the delivery front.
- Ensure Clarity on Process, Deliverables, Finance and target dates to the customer.
- Convert Customers to Envigo Brand Ambassadors
  - Get Clutch Reviews
  - Bring Customers to Joint Marketing activities for Envigo.
  - Build References
- Ensure seamless customer experience during onboarding and offboarding.
  - Clearly defined process and educational content.
  - Tailor makes the process based on the category and size of the customer.
  - Identify gaps and improve on a periodic basis.
- Conduct CSAT Survey and actions to improve based on the feedback.
  - Lessons Learned are tracked and actions are taken across the board.
- The objective is to have not just a happy customer, but a delighted/WOW customer.
- Implement adequate processes/audits to ensure Customer Success is improved and anomalies are addressed.
- Be available for Escalations to reduce the customer impact and earn trust.
- Good Understanding of the Business Use cases of the customers that we are handling and a good grip on the overall domain that they operate in.

### Employee Success

- Develop and bring a sense of camaraderie and collaboration among the employees.
- Responsible for the Team's growth within the organization by providing candid feedback and showing pathways to improve and grow.
- Be part of recruitment strategies and identify key talents and nurture them.
- Conduct Feedback Loops to understand the pulse of the employees.
- Work closely with RTC for training plans for employees

- Organize Team building activities.
- Rewards and Recognitions
- Be a good listener and learn and adapt according to the situations. Empower your team to take responsibility and support them in achieving their goals.

## Operational Success

- Continue to improve process efficiency and productivity of the team.
- Work closely with RTC, and Technology COE to implement best practices including ISO standards and future ones.
- Aid organization/business unit-specific certifications
- Reduce Following Risks
  - Individual dependency on employees for long-running projects.
  - Adequate documentation allows the Team to move from one project to another seamlessly.
  - Understanding the spending of customers for upcoming quarters and planning for resource needs accordingly.
- Conduct Project Process Audits to ensure all the projects are in the right direction.
  - Make sure all data points are collected to evaluate the project, people and process so that data-driven decisions can be taken.
- Understand and mitigate risk proactively and effectively.
- Provide Process Improvement Suggestions and take initiatives to implement them across the organization.
- Be part of Strategic committees dedicated to taking forward key Organizational wide initiatives.

## Business Unit Growth

- Track and Take initiatives in increasing revenue from existing customer accounts.
- Work closely with BU heads to Upsell Services to your customers.
- Generate marketing content pipeline from existing projects and customer base.
  - Case Studies
  - Quick bites
  - Achievements
- Suggest new blueprints for increasing reach to customers.
- Track Profits within Business Units with the help of the Finance Team.
  - Track Project Profit
  - Track Individual Billability
  - Track Productivity through hours clocked.
- Identify and schedule teams to attend relevant events to explore innovation and lead generation.

## Process Adherence

- Proactively inform the leaves and availability of the line manager and it should be planned well and applied upfront in HRone. Inform the same PM if you are in an emergency situation
- Maintain 40 Hrs and clock the efforts to the Time Management tool accurately and on time.

## PROJECT MANAGER LEVEL 1 - Competency Required

Iceberg Elements	Competency Attributes List (Weightage)
Skills (Proficiency)	<ol style="list-style-type: none"><li>1. Effective Communication (5)<ul style="list-style-type: none"><li>o Strong persuasive verbal communication and exquisitely written skills in English</li></ul></li><li>2. Listening Skills (5)</li><li>3. Big Picture Thinking (3)<ul style="list-style-type: none"><li>o Understand and evaluate the big picture.</li></ul></li><li>4. Time Management (5)<ul style="list-style-type: none"><li>o Organized and Effective Time Management to cater to multiple initiatives in parallel</li></ul></li><li>5. Leadership (4)<ul style="list-style-type: none"><li>o Charismatic Leader and able to influence the behaviour of the team in a positive way.</li><li>o Data Driven Decision Making that is fair and communicated precisely as to why the decision was made.</li></ul></li></ol>
Knowledge (Proficiency)	<ol style="list-style-type: none"><li>1. Technical Knowhow (3)<ol style="list-style-type: none"><li>a. Business &amp; Technology understanding</li></ol></li><li>2. Standard SAAS Products Understanding (3)<ol style="list-style-type: none"><li>a. A good view of the latest technologies and 3<sup>rd</sup> party products that have been used.</li></ol></li><li>3. Project Management Best Practices (3)<ol style="list-style-type: none"><li>a. Good understanding of Best Practices of Product Development, the IT Industry and Agile Processes</li><li>b. Effort/Cost Management Awareness</li><li>c. Resource Management and Utilization</li><li>d. Scope Control Process</li><li>e. Estimation vs Actuals</li><li>f. Collection of Adequate data to aid decision-making and lessons learned.</li></ol></li><li>4. Risk Management (3)</li></ol>

	a. Identifying risk and finding ways for mitigating risk.
Self-Image (Perspective)	<ol style="list-style-type: none"> <li>1. Confident and Passionate</li> <li>2. Empathetic and a people person</li> </ol>
Traits (Perspective)	<ol style="list-style-type: none"> <li>1. Positive Attitude and continue to see the good side of the team.</li> <li>2. Accept Failures and Take Lessons</li> <li>3. Empathic</li> <li>4. Willingness to learn and adapt</li> <li>5. Honest</li> <li>6. Servant Leader</li> <li>7. Approachable and Friendly</li> </ol>
Motives (Perspective)	<ol style="list-style-type: none"> <li>1. Thrive for constant improvement.</li> <li>2. Finds satisfaction in taking up challenges and executing them</li> <li>3. Passionate about growth</li> <li>4. Finds joy in impacting the lives of people and organizations in a positive way.</li> </ol>

## PROJECT MANAGER LEVEL 1 - PERFORMANCE MANAGEMENT GOALS

Goals are categorized into 3 sections

Category	Details	Weightage
Business Outcome	Goals are Defined below in detail.	60%
Proficiency	Showcase growth in Knowledge and skills This will be done in Skills-Base Tool. You would do a self-assessment and for the given role we will have a desired level of competency against each skill and knowledge.	15%
Perspective	You Attitude and Traits are assessed by 360 Degree Feedback. We'll take a cross-section of your direct team, your manager, your peers and dotted-lined employees to get feedback. This would be part of the appraisal life cycle.	25%

## PROJECT MANAGER LEVEL 1 - Goals – Business Outcome

Category	Weightage 60	Details
Customer Success	15%	Individual Detailed KPIs would be derived from the role sheet
Employee Success	10%	
Operational Success	15%	
Business Unit Growth	10%	
Process Adherence	5%	
Organisation Growth	5%	

## PROJECT MANAGER LEVEL 2 - Competency Required

Iceberg Elements	Competency Attributes List (Weightage)
Skills (Proficiency)	<ul style="list-style-type: none"> <li>6. Effective Communication (5) <ul style="list-style-type: none"> <li>o Strong persuasive verbal communication and exquisitely written skills in English</li> </ul> </li> <li>7. Listening Skills (5)</li> <li>8. Big Picture Thinking (3) <ul style="list-style-type: none"> <li>o Understand and evaluate the big picture.</li> </ul> </li> <li>9. Time Management (5) <ul style="list-style-type: none"> <li>o Organized and Effective Time Management to cater to multiple initiatives in parallel</li> </ul> </li> <li>10. Leadership (5) <ul style="list-style-type: none"> <li>o Charismatic Leader and able to influence the behaviour of the team in a positive way.</li> <li>o Data-Driven Decision Making that is fair and communicated precisely as to why the decision was made.</li> </ul> </li> </ul>
Knowledge (Proficiency)	<ul style="list-style-type: none"> <li>5. Technical Knowhow (3) <ul style="list-style-type: none"> <li>a. Business &amp; Technology understanding</li> </ul> </li> <li>6. Standard SAAS Products Understanding (3) <ul style="list-style-type: none"> <li>a. A good view of the latest technologies and 3<sup>rd</sup> party products that have been used.</li> </ul> </li> <li>7. Project Management Best Practices (4)</li> </ul>

	<ul style="list-style-type: none"> <li>a. Good understanding of Best Practices of Product Development, the IT Industry and Agile Processes</li> <li>b. Effort/Cost Management Awareness</li> <li>c. Resource Management and Utilization</li> <li>d. Scope Control Process</li> <li>e. Estimation vs Actuals</li> <li>f. Collection of Adequate data to aid decision-making and lessons learned.</li> </ul> <p>8. Risk Management (4)</p> <ul style="list-style-type: none"> <li>a. Identifying risk and finding ways for mitigating risk.</li> </ul>
Self-Image (Perspective)	<ul style="list-style-type: none"> <li>3. Confident and Passionate</li> <li>4. Empathetic and a people person</li> </ul>
Traits (Perspective)	<ul style="list-style-type: none"> <li>8. Positive Attitude and continue to see the good side of the team.</li> <li>9. Accept Failures and Take Lessons</li> <li>10. Empathic</li> <li>11. Willingness to learn and adapt</li> <li>12. Honest</li> <li>13. Servant Leader</li> <li>14. Approachable and Friendly</li> </ul>
Motives (Perspective)	<ul style="list-style-type: none"> <li>5. Thrive for constant improvement.</li> <li>6. Finds satisfaction in taking up challenges and executing them</li> <li>7. Passionate about growth</li> <li>8. Finds joy in impacting the lives of people and organizations in a positive way.</li> </ul>

## PROJECT MANAGER LEVEL 2 - PERFORMANCE MANAGEMENT GOALS

Goals are categorized into 3 sections

Category	Details	Weightage
Business Outcome	Goals are Defined below in detail.	60%
Proficiency	Showcase growth in Knowledge and skills This will be done in Skills-Base Tool. You would do a self-assessment and for the given role we will have a desired level of competency against each skill and knowledge.	15%

Perspective	You Attitude and Traits are assessed by 360 Degree Feedback. We'll take a cross-section of your direct team, your manager, your peers and dotted-lined employees to get feedback. This would be part of the appraisal life cycle.	25%
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## PROJECT MANAGER LEVEL 2 - Goals – Business Outcome

Category	Weightage 100	Weightage 60	Details
Customer Success	25%	15%	Individual Detailed KPIs would be derived from the role sheet
Employee Success	25%	10%	
Operational Success	25%	15%	
Business Unit Growth	25%	10%	
Process Adherence	-	5%	
Organisation Growth	-	5%	

## PROJECT MANAGER LEVEL 3 - Competency Required

Iceberg Elements	Competency Attributes List (Weightage)
Skills (Proficiency)	<ul style="list-style-type: none"> <li>11. Effective Communication (5) <ul style="list-style-type: none"> <li>o Strong persuasive verbal communication and exquisitely written skills in English</li> </ul> </li> <li>12. Listening Skills (5)</li> <li>13. Big Picture Thinking (3) <ul style="list-style-type: none"> <li>o Understand and evaluate the big picture.</li> </ul> </li> <li>14. Time Management (5) <ul style="list-style-type: none"> <li>o Organized and Effective Time Management to cater to multiple initiatives in parallel</li> </ul> </li> <li>15. Leadership (5) <ul style="list-style-type: none"> <li>o Charismatic Leader and able to influence the behaviour of the team in a positive way.</li> <li>o Data-Driven Decision Making that is fair and communicated precisely as to why the decision was made.</li> </ul> </li> </ul>



Knowledge (Proficiency)	9. Technical Knowhow (3) <ul style="list-style-type: none"> <li>a. Business &amp; Technology understanding</li> </ul> 10. Standard SAAS Products Understanding (3) <ul style="list-style-type: none"> <li>a. A good view of the latest technologies and 3<sup>rd</sup> party products that have been used.</li> </ul> 11. Project Management Best Practices (5) <ul style="list-style-type: none"> <li>a. Good understanding of Best Practices of Product Development, the IT Industry and Agile Processes</li> <li>b. Effort/Cost Management Awareness</li> <li>c. Resource Management and Utilization</li> <li>d. Scope Control Process</li> <li>e. Estimation vs Actuals</li> <li>f. Collection of Adequate data to aid decision-making and lessons learned.</li> </ul> 12. Risk Management (5) <ul style="list-style-type: none"> <li>a. Identifying risk and finding ways for mitigating risk.</li> </ul>
Self-Image (Perspective)	5. Confident and Passionate 6. Empathetic and a people person
Traits (Perspective)	15. Positive Attitude and continue to see the good side of the team. 16. Accept Failures and Take Lessons 17. Empathic 18. Willingness to learn and adapt 19. Honest 20. Servant Leader 21. Approachable and Friendly
Motives (Perspective)	9. Thrive for constant improvement. 10. Finds satisfaction in taking up challenges and executing them 11. Passionate about growth 12. Finds joy in impacting the lives of people and organizations in a positive way.

## PROJECT MANAGER LEVEL 3 - PERFORMANCE MANAGEMENT GOALS

Goals are categorized into 3 sections

Category	Details	Weightage
Business Outcome	Goals are Defined below in detail.	60%
Proficiency	Showcase growth in Knowledge and skills This will be done in Skills-Base Tool. You would do a self-assessment and for the given role we will have a desired level	15%

	of competency against each skill and knowledge.	
Perspective	You Attitude and Traits are assessed by 360 Degree Feedback. We'll take a cross-section of your direct team, your manager, your peers and dotted-lined employees to get feedback. This would be part of the appraisal life cycle.	25%

## PROJECT MANAGER LEVEL 3 - Goals – Business Outcome

Category	Weightage 100	Weightage 60	Details
Customer Success	25%	15%	Individual Detailed KPIs would be derived from the role sheet
Employee Success	25%	10%	
Operational Success	25%	15%	
Business Unit Growth	25%	10%	
Process Adherence	-	5%	
Organisation Growth	-	5%	

## Next Steps

If you are reading this for the first time, We recommend you take a Self-Assessment to understand where you stand according to this expectation by talking to your HR SPOC.

## PERFORMANCE REVIEW

Category	Tool	Responsible	Details
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Business Outcome	HRONE	<p>Goals would be divided to multiple people for Review</p> <p>e.g. HR Related Goals would be HR Manager</p>	<p>Self-Evaluation from Sep 1 to Sep 15 Mar 1 to Mar 15 A review Session would be scheduled by HR SPOC/Manager. Meeting will include</p> <ol style="list-style-type: none"> <li>1. Reporting Manager (Mandatory)</li> <li>2. HR Manager (Mandatory)</li> <li>3. Finance Manager (Mandatory)</li> <li>4. Technology COE Head (Mandatory)</li> <li>5. RTC SBU Head (Mandatory)</li> <li>6. Sales SBU Head (Mandatory)</li> </ol> <p>All concerned reviewers should have the ratings done and ready before the meeting. We assess together as to why these ratings and come to a consensus.</p> <p><b>1 Hour Meeting.</b></p>
Proficiency	Skills Base	Reporting Manager Technology COE RTC	<p>Self-Assessment from Sep 1 to Sep 15 Mar 1 to Mar 15 Rating Took from the Skills-base</p>
Perspective	Survey Sparrow	Peers, Dotted Line Manager, Direct Reporters	<p>This would be conducted from Sep 1 to Sep 15 Mar 1 to Mar 15 Rating Took from the 360-degree tool.</p>