

Client Engagement Checklist

Client	Service scope and expected timeframe
{client}	{short description + reference to WO/contract if available.}

Completed by
Title
Date

This checklist should be completed and saved as a versioned pdf on initial engagement and for any major updates to the scope of work, change in assigned consultants etc.

1 ENGAGEMENT DETAILS

Item	Agreement
Service Type	{Resource (manpower) / Fixed price delivery / other (describe)}
Quality System	
IT Environment	
Required Qualifications (TriTiCon evaluation)	
Resource(s) delivering the service	

2 ENGAGEMENT EVALUATION

{Indicate as Yes and ~~No~~. Specify rationale if accepting an engagement with any "No"s

Evaluation Item	Evaluation / Comment
Is the contract complete* and signed <i>* including relevant addendums for confidentiality, data processing etc.</i>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Is the service/task/delivery clearly defined and expectations clear and aligned.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No – {Rational if accepting}
Is the service/task/delivery value-adding for the client and a viable activity with regards to client objectives and needs (considering cost, resources, priorities etc.)?	
Are the prerequisites at the client (and other vendors/providers) regarding capacity, knowledge, commitment etc. fulfilled.	
Are the TriTiCon resource(s) qualified to deliver the service?	
Do the TriTiCon resource(s) have required capacity deliver the service?	
Are TriTiCon resource(s) qualified to deliver the service?	
Are there any other major risks for the engagement not succeeding and delivering expected client value?	
Engagement Accepted	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No