IT Outsourcing Playbook

A Deep Dive into Our Thought Processes and Best Practices for Managing Customer Engagements



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As a client, new to Edvantis or IT outsourcing as a concept, you have a fair share of questions and reservations around the collaboration process. We designed this Playbook to address those beforehand, plus empower you to take the necessary operational prep steps at your end.

Why a Playbook?

Because traditionally the pre-sales and engagement stages of the IT outsourcing partnership were kept opaque. There are no industry-approved "this happens first, then we do that" frameworks.

Purchasing IT services is hard as there are no clear-cut standards when it comes to:

- Services scopes and boundaries
- Services delivery models
- Industry-wide quality standards

Sure, you, us, and other vendors use the sassy buzzwords such as "time and materials" and "fixed-price" to describe the arrangements. But the reality is that those terms often don't carry any indications of whether your partnership will be successful or not.

At Edvantis, we prefer working in the open. So we took it as our goal to bring clarity and repeatability to the outsourcing process. That's why we are sharing a collection of practices we found to work best for managing expectations on both ends. These principles help establish fair, equitable, and transparent collaboration terms.

At the same time, we realize that rigid standard operating procedures (SOPs) won't cut it, given the variability of clients' needs and operational readiness for outsourcing.

That's why our playbook has a recommendative, rather than prescriptive nature, reflective of our key company values — flexibility, co-creation, and focus on results.

After reading this playbook you will:



Learn how to gain consistent value from technology partnerships.



Enter the engagement process with sufficient knowledge and groundwork.



Develop a staunch base for subsequent mutual accountability and effective management.

Engagement Process at Edvantis: Overview

Service commissioning and delivery is a semi-structured process. Meaning, the two parties go through several stages of discussion, negotiation, and alignment. Not all stages are mandatory though.



1. Pre-Engagement Discussion Session(s)

Our team analyzes the provided project details — the outlined scope of work, any preliminary project requirements, and other types of documents you've felt comfortable sharing. We'll get back to you with questions to further understand your business context and the preliminary scope of engagement.

> After contacting me, Edvantis offered to meet in person. They were the first company that wanted to do so.

Michael Saringer,

CEO of Alturos Destinations GmbH

2. Customer Workshop

optional

Designed primarily for clients new to IT outsourcing, a workshop provides an opportunity to gain answers to different types of operational, organizational, and risk management questions you may have about the upcoming partnership. During this hour our team will assess your readiness to outsource, highlight likely constraints, and suggest further steps for ensuring a successful kick-off.



Workshops are an optional step we recommend to first-time clients, looking for extra knowledge and operational support.

3. Preliminary Proposal

Based on the collected intake information, our team produces a preliminary commercial proposal — a document detailing our understanding of your project goals and business background. It also includes an explorative overview of the expected scope of work, recommended service model(s), and project timelines/budget.



A preliminary proposal is up for review and discussion. We expect active input from your end to achieve full alignment and refine our value proposition.

4. Discovery optional

If we have collected sufficient intake information during the previous stage, we'll process your feedback on the preliminary proposal and move forward with a commercial offer. If our team needs extra context and guidance, we'll propose a discovery — a structured conversation around your project vision, goals, and requirements, concluded with a report on our findings. Discoveries are more common for fixed-price projects, but also make sense for establishing the scope of other engagements.

We got very fast feedback from Edvantis, and their documentation was higher-quality. They were very proactive in the discovery workshops and asked the right questions. They understood our problems and reacted to them.

Robert Tingaud,

Senior Director SW & Controls Development, Kardex Remstar

5. Formal Proposal

At this point, we have reached a good alignment on your project goals, scope, and ultimate list of requirements. You have high confidence in our ability to deliver. We have sufficient context for committing to a scoped range of deliverables. The two of us are on the same page expectation-wise. All of this knowledge is packed into a formal commercial proposal.



A formal proposal can still be revised. But the goal of previous steps is to minimize the scope of possible revisions to move faster to value creation.



6. Engagement Kick-Off

After the formal proposal is countersigned, we prepare supporting legal documents such as Master Service Agreement (MSA) and Statement of Work (SoW). Once the two are signed, we proceed with the follow-up onboarding steps, which slightly differ depending on the selected service model.



At this point, our goal is to ensure efficient work kick-off and minimize administrative and operational delays.

7. Co-Creation

And we are on track! You will now work closely with an Account Manager (AM) — a person you've got to know during the previous stages. An AM serves as your main point of contact and facilitates the delivery of all aspects of work, indicated in the formal proposal and statement of work document.



Depending on the selected service model, Edvantis' involvement levels will vary from baseline administrative and operational support to more hands-on team performance management.

Edvantis never hesitated to send their team to our offices to make sure the integration project went smoothly. They were very proactive on that front. Even post-integration, they were very engaged.

Robert Alvarez, CFO & COO, BigCommerce

Why This Process

We went through a series of trial-and-error before we found the optimal structure and cadence for new customer engagements. This process is a direct result of our internal discussions, analysis of successful partnerships, and retrospectives of side-tracked engagements — happening over the last two decades.

As mentioned earlier, this is not a rigid practice we impose on you — but a flexible, evolving framework for ensuring an effective sales and client onboarding process.

Benefits for you:

Faster time-to-value

Clear-cut and transparent offers

Predictable results

Operational risk mitigation

Engagement Process at Edvantis: Deep Dives on Prep Steps

The follow-up sections provide a deeper level overview of each step with extra checklists and tips to prime you for a successful start. Our goal is to describe what happens at every step of the process, manage your expectations, and direct you towards important checkpoints.

Each step includes:



A more in-depth overview



Main sub-steps and recommended documents



Extra tips and checklists you can use

Step 1:Pre-Engagement Discussion Sessions

During the earliest stage, our goal is to gather preliminary information on your project, touch general bases, and develop tentative assumptions.

Typically, you'll have a short call with one of our Account Managers or Engagement Managers.



Be Ready to Talk About:

- 1. Your project vision and goals
- 2. Technical requirements and potential constraints
- 3. Pre-planned scope of work
- 4. Past experience with IT outsourcing
- 5. Overall expectations in regards to collaboration, operational alignment, etc.

We use the provided information to analyze the project scope, identify potential risks and blockers, estimate your capacity needs, and suggest the optimal service model.

Types of Documents To Prepare and Provide as a Client at Pre-Engagement

Project vision

Can be an informal summative description of the type of software you'd like to develop, upgrade, extend, or modify.

Project goals

Bullet points, summarizing what you'd like to achieve (e.g. migrate from legacy codebase to a newer framework).

Expected scope of work & project requirements

If you have a formalized list of scope/ software specifications, excellent! If not, we can work on this together, based on the available data and documents. To better service you we need to understand the depth and direction of your project.

UI/UX mockups



Good to have, but not necessary. Mockups and product demos help our experts better understand your product.



Are you an experienced buyer with a formal request for proposal (RFP)

document? If your template covers all of the above points and provides sufficient intake information, we'll complete it and send it over to you with extra clarifications (if necessary).

Types of Requirements You Need to Provide Before Project Kick-Off

Functional requirements — characteristics that a solution must have in terms of behavior and information management. Functional requirements specify what a system should and should not do in defined circumstances. They are determined by the type of software you are creating and the user needs it attempts to address.

For example: "As a paid subscriber, I can configure my subscription preferences to receive all relevant job alerts without visiting the site".

Non-functional requirements (also named quality of service requirements) — do not relate directly to the product's functionality and behavior. Instead, they define what makes the product effective and what qualities it should have (e.g. how secure/usable/scalable the solution has to be).

For example: "As a user, I want the website to be available 99.999 percent of the time when I try to access it so that I don't get frustrated and go elsewhere."

Follow the link to learn more about <u>different requirement gathering techniques</u>.

Recommended Legal Document: Non-Disclosure Agreement (NDA)

At Edvantis, we recommend counter-signing an NDA during the early stages of the engagement. Why? Because signing an NDA early on has a **number of benefits**:



Facilitates free discussion of technical and business information



Safeguards any confidential details from disclosure

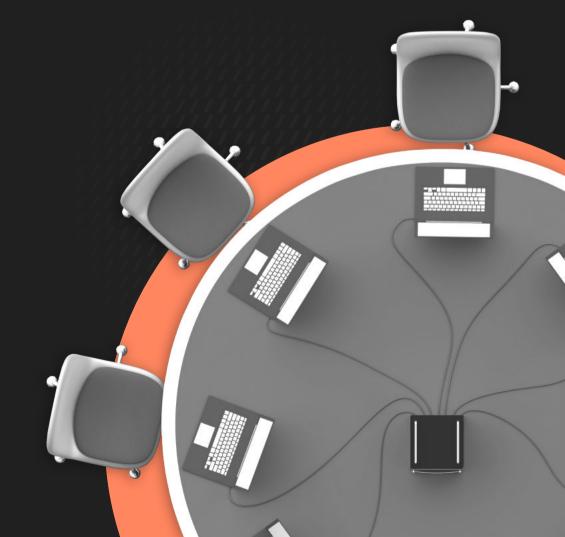


Establishes trust between you and us

optional

Step 2:Customer Workshop

If you are new to IT outsourcing, a customer workshop gives you an opportunity to talk with our team about the prerequisites for a successful engagement. Our specialists can help you determine your readiness for outsourcing and advise on the scope of required operational changes.



For First-Time Buyers, We Offer to Host an Onboarding Workshop

Typically, it's a virtual or in-person event with our team who'll provide a detailed lowdown on:

- IT outsourcing general best practices
- Process readiness for outsourcing
- Knowledge management for distributed teams
- Billing and contractual obligations
- Overall responsibilities of both parties

Get ready to pose your questions too! Our goal is to make sure that you walk away with a comprehensive understanding of the follow-up steps and insights for optimizing your operational process for the upcoming collaboration.



Having a counter-signed NDA at this stage is crucial.

When a Company is Ready to Outsource IT?

IT outsourcing is a process. Like every other type of efficient process, it needs to run in a well-organized environment. This means your company has to be operationally ready for integrating an external vendor, not just dire to get someone on board fast. But what does such operational readiness entail?

A clear understanding of:

- How IT outsourcing fits into your business strategy
- Where outsourcing can create the most value
- What type of outcomes you expect close gaps in capacity, scale the delivery, or obtain a complete product
- How you will oversee and manage the collaboration with a team/vendor
- Whether you'll need to adapt your operating model to distributed work

Outcomes such as higher team efficiency, better software quality, and faster time-to-market are a direct result of the work environment you co-create together with the vendor.



Use this <u>checklist</u> to assess your operational readiness for outsourcing.

Step 3:Preliminary Proposal

Post-initial discussions, our experts do the background assessment of your business needs, project scope, and expected outcomes.



We Prepare a Formal Commercial Proposal Based on the Collected Data. It Includes:

- Our understanding of your company needs and project goals
- What kind of value we can deliver and how we'll do it
- Recommended service model and team composition
- Pre-planned scope of work
- Project timelines and budget estimates
- Identified risks and risk mitigation plan

At this point, we operate based on our assumptions. Thus, we are fully open to further discussions. In fact, that's what we expect from you! How can we establish better synergy? How can we align better? These are the points up for debate.

The purpose of this step is to jointly arrive at the optimal engagement plan and help you select the right service model. So that you could gain more benefits from outsourcing, rather than get the job done in one way or another.

Our position is simple: we try to manage the customers' expectations before placing them in a rigid contract. We proactively acknowledge risks, known constraints, and feasibility of delivering on the set demands, rather than let these slip into the later stages of the project (and compromise the success rates).

Ruslan Zakharchenko,

Chief Executive Officer, Edvantis

Primer on IT Service Models at Edvantis

	Staff Augmentation	<u>Managed Team</u>	Managed Project
Scope	Augment your in-house teams with extra IT talent, staffed by Edvantis and managed directly by you.	Gain access to an entire cross-functional team, recruited and managed by us for stellar performance.	Receive a complete software solution or MVP, developed according to your specifications within the provided timeline and budget.
Edvantis' Responsibilities	 Talent acquisition, based on your requirements Administrative support On-site operational team support Candidate replacements Team ramp-up¹ 	 Talent acquisition. Shared responsibility for team composition selection SDLC setup and/or mirroring Administrative support Team management Compliance with set project KPIs 	 Project infrastructure setup Team composition Workload allocation and team management Project delivery on time, according to specs and budget
Clients' Responsibilities	 Team onboarding Workload allocation Project management Performance management 		
Optimal for	Organizations with mature software team management practices and experience with managing a remote workforce.	Companies with an ability to generate a clear project vision and internal practices for coordinating distributed teams.	Time-bound, relatively small-scale projects with a clear set of deliverables such as MVP development.
Competitive benefits:	 Access to in-demand skills Lower TCO compared to local resources 	Stable, scalable team performanceLower managerial involvement	 End-to-end software solution development Risk-sharing

¹Based on the contract-specified conditions and subject to time constraints

Primer on Team Roles and Composition

Staff augmentation assumes you will be involved in selecting the team composition. In a managed team model, you'd have to review and approve the proposed roles. Surely, you already have role descriptions for key technical candidates. But you might be overlooking other supporting roles, necessary for sustainable project progress and delivery.

Below is a sample role matrix you can use as a reference to determine what roles you need on your team and what each person does.

	Managed Team	Staff Augmentation	Description	Stages When Active
Product Owner	Present on the client's side (as a visioner) + as a Proxy on Edvantis' side.	Client-side	A product owner (PO) communicates the project vision and requirements to the team(s), prioritizes work backlog, and shapes up the product roadmap.	DiscoveryEngagement Kick-OffDevelopmentMaintenance
			A proxy PO facilitates communication with the remote team and discerns knowledge, obtained from the client's PO.	
Project Manager	Shared: Client-side PM is typically responsible for budget management and timelines. Proxy PM role at Edvantis is performed by a Team Lead or an equivalent role.	Client-side	A project manager is the direct point of communication with the development teams. She performs project planning, backlog management, cost estimation, performance management, status reporting, and change management.	 Engagement Kick-Off Development Maintenance

²The role is filled in by a Business Analyst (BA)

	Managed Team	Staff Augmentation	Description	Stages When Active
Business Analyst	Mainly on Edvantis side. Though a BA role can be present on the customer end too.	Edvantis side	BAs are actively involved in the early stages of engagement and product development. At Edvantis, our BA team helps us analyze the provided project requirements, your business domain, and solutions roadmap to create the optimal proposal and suggest team composition, service model(s).	 Pre- engagement Customer workshops Discovery Development (if necessary)
QA	Mainly Edvantis side, though a client may have a separate in- house QA team ³ .	Client-side and/or Edvantis side (depending on the project)	A Quality Assurance (QA) engineer is responsible for ensuring that the shipped code meets all the set quality standards. They verify that the developed solution meets both technical and user requirements.	DevelopmentQuality AssuranceMaintenance
UX/UI Designer	Mainly Edvantis side, though a client may have a separate in- house UX/UI role.	Client-side and/or Edvantis side (depending on the project)	UX/UI designers are responsible for designing the presentation layer of the software product — mapping the main user flows, creating the overall logic, and designing attractive and intuitive graphic interfaces.	• Development
Account Manager	Edvantis side	Edvantis side	An Account Manager is your main point of contact with Edvantis — a supporting role, designed to help you with administrative and operational issues at the early stages of the engagement. They ensure your success and satisfaction with the provided services during subsequent stages.	 Pre- engagement Customer workshops Discovery Engagement kick-off Services delivery (co- creation)

³In such cases, we suggest several SDLC adjustments

⁴In such cases, we suggest several SDLC adjustments

Role vs Position: the Differences

- A position is a formalized job title, suggesting your position with the company. "I'm a senior project manager for Project X".
- A role is a more fluid describer, suggesting your scope of responsibilities within a particular project.

"I'm filling in a role of Product Owner at this project, though my official title (position) is a Business Analyst"

In the chart above you may have noticed that we focus more on roles, rather than positions. For example, within a Managed Team the role of Project Manager is often performed by a Senior Developer (Team Lead), rather than a separate hire. Likewise, a proxy PO role is something a BA does. Essentially, our people are trained to wear several "hats" on a perneed basis. Such a structure helps keep the teams nimble, agile, and high-performing.

Likewise, at our clients' ends, the role of a Product Owner for the project is often filled in by people with other titles — a CTO, Technical Director, Program Manager, etc. The point here is that you need to assign a person who'll handle PO/PM duties to ensure smooth project progression.

optional

Step 4:Discovery

The project discovery phase provides the "headspace" to formalize your software product vision and put down all the necessary functional and non-functional requirements. It's a critical step for determining the optimal approach to software development.



Doing Discovery Helps You Frame:

- Main problem statement
- Scope and boundaries of the proposed solution
- Team and tech stack you'll need for the project
- Risks and bottlenecks that may derail your efforts
- Preliminary roadmap for product development and delivery

This stage is skippable for clients with a well-defined project vision, scope of work, and a clear list of project requirements.



Discovery is highly recommended for managed projects.

Why do we insist on formal discovery for end-to-end IT outsourcing projects? This step helps us ensure that we have all the knowledge we need to successfully deliver your solution and understand your rationale and requirements better. So that we could achieve better results together.

Outputs From the Discovery Phase:

- **Problem Statement** a succinct "snapshot" of the problems your solution will address.
- **Defined and prioritized scope of work** a project roadmap, describing all the work requirements, specific deliverables, and timelines we can commit to.
- **Key personnel resources and skill sets identified** an overview of roles, required at your side (typically at PM/PMO level), along with the jointly-approved team composition, and optimal IT service model.
- Project risks, assumptions, and limitations overview of identified risks and
 constraints that may delay project kick-off or impact the development process if left
 unaddressed. We also proactively address any limitations, arising due to technical feasibility
 or other operational constraints.



We also require the above knowledge to ensure smooth kick-off for other service delivery models — managed team and staff augmentation.

Step 5:Formal Proposal

The talks are done. All points are discussed. We make our final move and forward you a formal commercial proposal — a document explaining at length how the engagement will go.



The Standard Commercial Proposal Includes:

- 1. Executive summary
- 2. Problem statement and solution
- 3. Scope of work
- 4. Team composition
- 5. Assumptions and limitations
- 6. List of deliverables
- 7. Project schedule

- 8. Billing information and payment schedule
- 9. The acceptance (project sign-off)

The formal proposal details all the earlier discussed aspects of cooperation — team composition, selected service model, timelines, budgets, constraints, and the actual jobs-to-be-done. It sets proper expectations and detailed responsibilities at both ends.



Unlike a preliminary proposal, a formal proposal sets forth more concrete terms of collaboration and serves as a blueprint for follow-up legal contracts. While it is still revisable (if needed), our goal is to minimize any potential gaps or omissions, through the previous steps.

Only the acceptance of a formal proposal and signage of Master Services Agreement (MSA) and Statement of Work (SoW) will signify the engagement kick-off — the actual delivery of the outlined services.

An MSA further formalizes the collaboration objectives, operational and service levels commitments the vendor will take. Typically, you have one MSA for the duration of the entire collaboration.

An SoW provides extra context into the project details. It specifies the number and type of deliverables the vendor will provide under the set terms. You may have several SoWs signed during the course of the collaboration as your outsourcing needs evolve.

Step 6:Engagement Kick-Off

With the proposal accepted we move on to preparing the supporting documents for our partnership — finalized statement of work (SoW) agreement, master service agreement (MSA), payment schedule, estimates for the development execution, and pre-approved overview of the technology stack.



Master Service Agreement (MSA)

Master Service Agreement (MSA), also known as Framework Agreement, is a contract that contains information about the future relationships with your outsourcing vendor, detailing the collaboration principles and agreement terms among other operational commitments. MSA sets the baseline expectations for each party. Basically, this document is a "promise" of collaboration that summarizes the terms but does not call for any actions or obligations on either party's part.

What an MSA Covers:

- The terms of a partnership
- Each party's commitments
- Payment conditions
- Terms of termination
- IP provisions (ownership, disclosures, etc)
- Liabilities and liability indemnification
- Warranties/guarantees (if applicable)

Statement of Work (SoW) Agreement

Statement of Work (SoW) is a document that sums up and describes the scope of the project — what should be done and what's excluded. This is a legally binding document, specifying the type of work the vendor commits to delivering under the set terms. A clear, concise, and easy-to-read SoW is imperative to the project's success so it shouldn't leave room for doubt or ambiguity.

The contract clarifies such aspects of a project as deadlines, terms, standards, payment information, acceptance criteria, estimations, etc. SoWs can also include other project information, like security concerns, post-project support, or terms for early termination.



A signed SoW marks the beginning of the actual work.

What an SoW Covers:

- Service description
- In scope/out of scope
- Team composition/roles (if applicable)
- Deliverables
- Schedules
- Requirements
- General budget
- Team ramp-up/down rules (if applicable)
- Organizational aspects of work
- Acceptance criteria (if applicable)
- Payment terms

Read more about legal contract work for outsourcing.

What Are You Expected to Do at the Engagement Kick-off?

Service delivery starts on the pre-agreed date, set after the signage of all legal documents. In most cases, the engagement can kick-off within 1-2 months after document signage. During this time, you have several important tasks to complete.

Appoint the main project lead and point of contact at your company

This can be a Product Owner, CTO, Technical Team Lead, or another person, who'll be driving the managerial work at your end and engage with our team(s).

Prepare the necessary work infrastructure for the new team

- Including access to specific tools, IDEs, code repositories, technical documentation, etc.
- Map and describe the optimal communication procedures i.e. who to contact for specific types of issues/information, what channels to use, how to escalate queries.
- Make a quick presentation about your project share your vision, goals, and important KPIs. Explain your coding standards, quality measures, Definition of Ready (DoR) and definition of done (DoD).

Establish communication plans and schedules

Below is a sample communication chart we propose:

A Sample Communication Chart

	Staff Augmentation	Managed Team	Managed Project
Kick-off meeting	For project kick-off and infrastructure alignment	One-time	Client's and Edvantis teams
Release planning	Collect/clarify requirements for the upcoming iteration	Bi-weekly	Client's PO and Tech experts; Edvantis Proxy PO, Tech Lead
Demo session	Present results of the iteration, obtain feedback	Bi-weekly	Client's core team; Edvantis Proxy PO, Tech Leads, AM
Status reporting	Report the status of the project	Bi-weekly	Client's PO; Edvantis Proxy PO & AM
Stand-up (internal)	Discuss current status, next steps and blockers	Daily	Edvantis team
Sprint retrospective	Discuss what was good and align on possible improvements	Bi-weekly	Edvantis team
On-demand meetings	Objectives are agreed beforehand based on agenda	On-demand	Roles will depend on the agenda

Knowledge Sharing Best Practices Before Project Kick-Off

	Staff Augmentation	Managed Team	Managed Project
Knowledge needed for kick-off	 Integration into your SDLC Access to collaborative coding tools (IDEs, version control software, and coding repositories) Access to project planning & management tools (JIRA, Asana, etc) Technical documentation Product/project specifications Programming style guides Code quality metrics and other IT KPIs Communication tools and communication schedule 	 Overview of your SDLC for mirroring Access to collaborative coding tools (IDEs, version control software, and coding repositories) Access to project planning & management tools (JIRA, Asana, etc) Technical documentation Product/project specifications Programming style guides Communication tools and communication schedule 	 SDLC setup by Edvantis Technical documentation Product/project specifications Functional and non-functional requirements Programming style guides

Step 7: Co-Creation

While the scope of Edvantis engagement varies depending on the selected service model, our **Account Management** remains proactively present to resolve any operational, communication, or team performance issues.

At every stage of our journey, we remain lean to changes and eager to help you gain more value from your engagement.



Each Engagement at Edvantis is Based on the Following Operating Principles:

From beginning to end, we aim for transparency and consistency in collaboration to cultivate win-win partnerships.

Therefore, we clearly communicate our responsibilities, potential risks, and terms of cocreation. We also establish an effective communication and reporting process to keep you informed, as well as ensure diligent business record-keeping.

We honor commitments and focus on results.

Quality comes first. We proactively advise our clients on how to get the most value from their investments through continuous recommendations on better team management, technology, and operational practices. Our goal is to become an organic extension of your business and ensure your success at different stages of your journey.

Customer data confidentiality and security are of the highest priority.

Edvantis takes proper steps to ensure that information entrusted to us is secure. Signing NDA is standard practice before we begin our collaboration, and we strictly follow the ISO 27001 standard. All our employees receive "Information on Security Policy and Anti-Phishing" training guide.

The Role of an Account Manager During Co-Creation Phase

Every client at Edvantis has a dedicated Account Manager — a person you get to meet during the early stages of the engagement process and one who will serve as one of your main points of contact throughout our partnership.

Account Managers at Edvantis have a facilitating role. They:

- Provide operational guidance and support
- Ensure project and client success

- Addresse and escalates possible issues
- Initiate change management at our end



Learn More Outsourcing Best Practices: Recommended Resources

Preparation:

- Software Development Methodologies: 4 Core Options
- The SDLC Process Explained: Key Phases and Methodologies
- The Best Ways to Align Distributed Teams in IT Outsourcing

Team Roles:

- What is a Cross-Functional Team?
- What Does a Business Analyst Do?
- What Does a Quality Assurance Engineer Do?
- Product Owner vs Project Manager vs Scrum Master: Who Do You Need When

Team Management:

- <u>8 Essential IT Metrics To Track For Project Success</u>
- How to Manage Change Requests Effectively In IT Outsourcing
- How to Create an Effective Work Breakdown Structure?
- Sprint Review: Is It Possible Remotely?

Co-Creating Software Success Together/