

## Standard Operating Procedure

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| Subject: Business Development Calendar       | Effective Date: January 2015 |
| Responsibility: Director, Strategic Partners | Revision Date: March 2019    |
| To: Business Development Team                | SOP No.: BD-001              |

### Purpose:

To establish a mechanism for tracking KRA Business Development (BD) activities and key events, anticipating staff participation that relates directly to the firms' growth strategy. Additionally, to maintain a complete, centrally located record of individual BD meetings, scheduled conferences, Workforce Development Board (WDB) Meetings, anticipated site visits, RFP release dates, pre-proposal bid dates, and proposal due dates.

### Procedure:

1. Make all relevant entries directly on the BD Calendar. Maintain Personal Calendar and Out of Office Calendar entries separately.
2. Only BD Team members have access to update this Calendar.
3. For all Calendar entries, use the following *abbreviated references*: Conference = CF; Workforce Development Board = WDB; Site Visits = SV; RFP Release Date = RFP; Due Dates = DD.
4. Access MS Outlook
  - a. Click "Open Shared Calendar"
  - b. Type "Business Development"
  - c. Click on "Appropriate Dates"
  - d. Click "To" and select "Business Development"
  - e. In the subject line, enter "Entry Type" – "Entry Title" – "Your Initials", then select the appropriate start-and-end dates and times.
  - f. In the Location line, enter the appropriate "City" and "State". What should appear on the Calendar:
    - Record *Conferences* as Subject: "CF" then "conference name" then "initials". Example: CF/SDWP Youth/FF. Location: "San Diego, CA"
    - Record *Workforce Development Board Meetings* as Subject: "WDB" then "Name of WDB & State" then "Initials". Example: WDB/Capital Area, NC/MS. Location: "Raleigh, NC"

- Record *Site Visits* as Subject: “SV” then “Site Name” then “initials”. Example: SV/KRA San Diego/FF. Location: “San Diego, CA”
  - Record *Anticipated RFP Release Date* as Subject: “RFP” then “RFP Title” then “Initials” Example: RFP/San Diego County/DS Location: “San Diego, CA”
  - Record *Due Dates for RFP’s* as “DD” then “RFP Title” then “Initials” Example: Subject: DD/Capital Area RFP/MS Location: Raleigh, NC
5. Click on “Categorize” on the Event toolbar and select the appropriate category for the entry.
  6. Click “Send” to complete

Related SOP: KRA-SOP-HQ-002 Out of Office Calendar

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