Getting Started

- New To Conduite
- Business Process
- Navigating The Documentation
- Anatomy Of A Conduite Application
- Anatomy Of The Conduite Google Workspace™ Addon

New To Conduite

What Is Conduite?

Conduite is a Google Spreadsheets™-based Enterprise Resource Planning (ERP) system that helps you manage the financials of your service business with ease. Conduite provides simple and actionable KPIs that help you track and manage the health of your business.

Conduite comes in 2 parts:

- A set of Google Sheets™ applications (see table below)
- A Google Workspace™ Addon that you can get in Google Workspace Marketplace™

Application	Description
◫ **Conduite Home**	Your landing page from where you can access all Conduite applications.
◫ **Conduite CRM**	Helps you manage your Business Development pipeline. You can track opportunities and estimate future revenue and margin over time.
◫ **Conduite Budget Builder**	Helps you build detailed budgets. You'll have clear margin calculations and tables ready to be shared to clients in your proposals.
◫ **Capacity Planner**	Helps you consolidate the work allocations for your team and to know who is working on what and when (present and future).
◫ **Conduite Project Dashboard**	Helps you track the financial health and progress of your projects (signed contracts) with limited effort. You'll get an appreciation of the financial health of your projects in seconds thanks to the (limited) insightful KPIs.
◫ **Conduite Project Report Out**	Helps you get a global overview of the financial health and progress of all your projects from a central location.

Where To Start?

Ask your Conduite Administrator to give you access to Conduite Home. From there you will be able to access all Conduite apps. Then install the Google Workspace™ Addon.

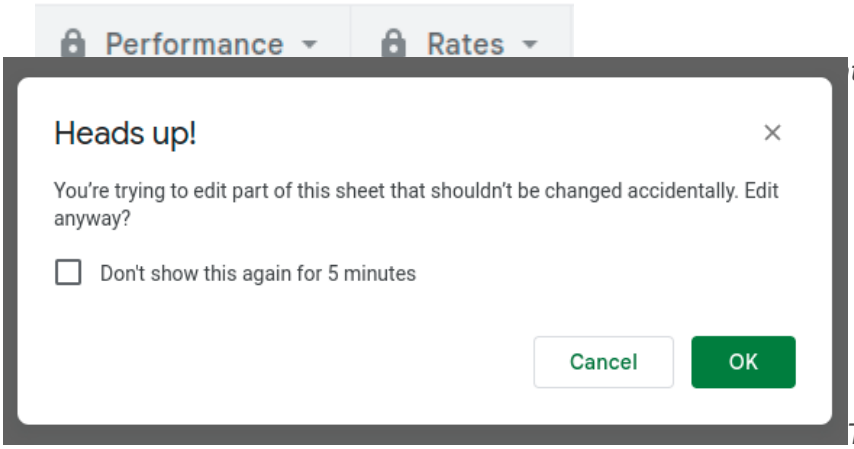
The Business Process page details the underlying business process Conduite is built upon. It will help you better understand how things work. The Glossary provides definitions for all concept and Key Performance Indicators used in Conduite. It can be helpful as you learn your way around the applications.

What You Need To Know About Conduite Applications

Based on Google Sheets™ - Google Sheets™ is part of Google Workspace™. It provides a ton of powerful features and tools on top of the typical spreadsheet functionalities. That is what makes Conduite possible: it combines several Google Workspace™ tools and Addons to provide an experience close to a web application.

Conduite Addon - The Addon provides is gives you access to features specific to each file such as transforming data for analysis or submitting data to another Conduite application.

Protected Cells/Tabs - The main downside of spreadsheets is that they can break easily, specially when many people use them. That's not the case for Conduite. We've protected cells and tabs so that you are warned each time you try to edit a cell or tab that you should normally remain untouched.



tes the tab as a whole is protected.

The popup that appears when you try to edit a protected cell or tab.

Configuration Tab - Each Conduite application has a hidden Configuration tab that contains information that is required for Conduite to function. As a user there is no reason why you would have to edit the content of this tab. **This tab should remain hidden.**

Adding New Lines - Adding new lines is often how you end up breaking a spreadsheet. Conduite applications are resilient and purposefully built to avoid that. You just need to make sure to copy the formulas to the new lines.

Adding New Columns - We do all we can to make Conduite resilient to adding columns but it's generally **not a good idea**. Although the applications might keep working, the Addon features might not since we have to make some assumptions about the structure of the file. This is certainly true for Conduite Standard Edition users. For Enterprise Edition users, you can also adjust the source code of the Addon.

Business Process

Introduction

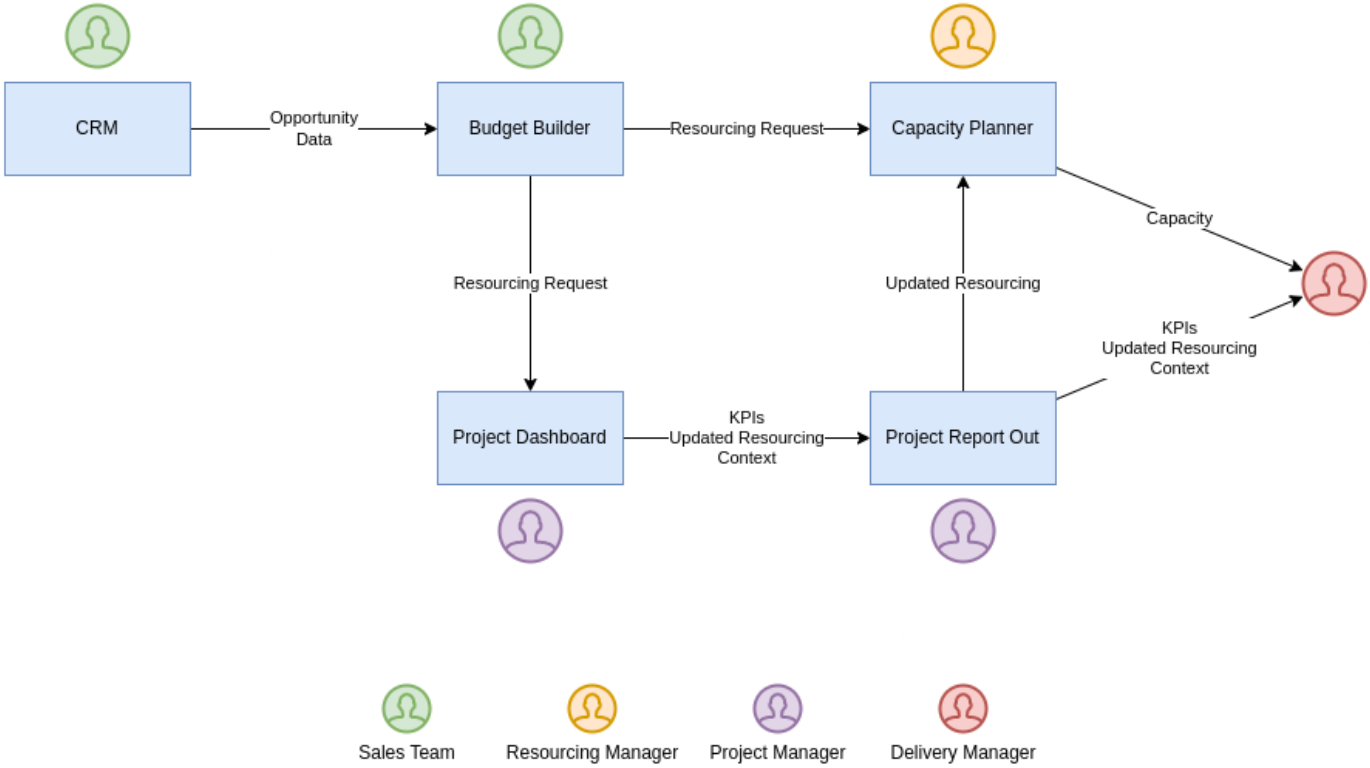
At the heart of every company there's a business process that orchestrates the main activities that are implemented. Conduite is built for service delivery and consulting organizations that:

- Conduct business in 2 main phases:
  - Business Development / Sales - You manage a pipeline of opportunities that eventually turn into contracts and projects you execute.
  - Execution - You deliver work according to a contractual scope of work.
- Sell mostly people's time (labor) based on daily rates
- Manage financial objective based on opportunity and contract margins.

For each of these phases, Conduite provides apps and KPIs that help you manage and track the health of your business.

Overview Of The Process

The overall business process can be broken down in 5 steps. It shows show the Conduite apps to support its implementation.



Data Flow Between Apps & Key Roles

1. Develop An Opportunity

Business Development

Your Sales Team develops leads that eventually become opportunities. You manage these opportunities with a **CRM** in which you qualify key attributes such as client name, amount, probability, start date and duration. The Sales Team keeps updating these attributes as discussions go with the prospects.

What is a Sales Team?

The Sales Team is a group of people in charge identifying potential clients (prospects) and to sell them the services that your company offers.

2. Create & Update The Offer

Business Development

If successful, your Sales Team will convince your prospect to send an offer. You start preparing a document with the appropriate narrative (methodology, risk analysis, ...), budget and timeline. In order to produce the two latter elements, you use a **Budget Builder** that helps you plan over time the number of days for each role (or person) needed to execute the scope of work. That tool also

provides you with the margin you can expect to make on this contract.

In order to secure the availability of the required roles in the event you win the opportunity, your Sales Team sends a Resourcing Request (days / role / period) to your Capacity Manager. S/He can pencil that workload into the **Capacity Planner** and starts working on potential resourcing conflicts. The Resourcing Request includes the probability of the opportunity so that the expected workload can be weighted.

What is a Capacity Manager?

The Capacity Manager (or Resourcing Manager) is the person who's job is to make sure that there is a consolidated view of who's working on what and when (present and future). As the main resource of your company is people's time, this is an essential function. It will allow you to know whether you have too much work coming up and need to hire, or if you need to make adjustments to manage a slowdown in activity.

As discussions evolve with the prospect, your Sales Team send updated Resourcing Requests to your Capacity Manager in order to for her/him to have the latest information.

3. Sign The Contract & Kick Off The Project

Execution

You've won the opportunity! □□ You endure the final administrative hurdles and sign the contract. It's time to kick off the project and set up the internal tooling. You need to configure your **Project Dashboard** that will help you track the execution of the project with the financial data from the contract (total amount, labor amount, expenses amount, expected margin) and with the most up to date Resourcing Request. That last piece in very important since you want to know how you team is doing against the initial plan.

At this point you can hand over the project to a Project Manager and start executing the scope of work.

What is a Project Manager?

The Project Manager is the person accountable for the proper execution of the project. S/He has to ensure that the client is happy with the work that is being delivered, that the financials of the project are under control and that her/his own team is happy. It's a role that requires a versatile mix of skills (technical, organizational, relational). Project Managers are key to the success of projects.

4. Manage The Project

Execution

Your team is actively working □□, i.e. spending days, on the project. It's important to have regular updates on how things are progressing in order to avoid bad surprises. You ask your Project Managers to update their **Project Dashboards** on a regular basis with how much time each person has spent on the project and with how many days s/he thinks will be required to deliver the expected scope of work, i.e. an updated resourcing. The **Project Dashboard** consolidates this updated information and feeds it back the Project Manager in the form of KPIs that tell her/him how s/he's doing financially.

Your Delivery Manager needs to centralize these updates in order to build a global overview of the situation. You ask your Project Managers to send a **Project Report Out** that includes specific KPIs from the **Project Dashboard**, the updated resourcing and a short narrative on what happened in the last period to give context to the numbers. The labor forecast goes the Capacity Manager that can update the **Capacity Planner** accordingly.

What is a Delivery Manager?

The Delivery Manager is a person in charge of overseeing execution (delivery) of projects. This is a senior role with strong Project Management skills and experience. S/He feeds off the regular project updates to trigger corrective actions in support to Project Managers. S/He is often accountable for the improving the way projects are executed. This role is often combined with the one of Capacity Manager.

With this update cycle in place you are able to keep track of projects (push corrective actions and/or praise colleagues) and of your capacity at all times.

5. Close The Project

Execution

After a lot of hard work, countless client meetings and presentations the project comes to an end. The client is happy □□ (or not □□). Your team organizes a project retrospective in order to learn from what went well and what went wrong.

The Key Metrics

Conduite apps provide a limited, yet powerful, number of metrics that allow you to track and manage the health your business. Most of the KPIs produced by Conduite apps are related to the margin objectives that you want to achieve during the business development and execution phases.

Definition of Margin

Margin is a term used in both business and finance to refer to the difference between the price of a good or service and the amount of money required to produce it. It is the amount of money that remains in your pocket once you have delivered a service.

Margin is usually expressed in percentage. Ex: if you sell a product or service for $1,000 with a 40% margin, you earn $400.

In Conduite, margins apply to many things:

- Labor (though Daily Rates)
- Budgets
- Contracts
- Projects

Margin Types

Margin Type	Description
Margin at Signature ($/%)	The margin computed at the time a contract is signed (provided by the associated Budget Builder). For a project this is a static value.
Margin Objective ($/%)	The margin objective that is set for a project. At the beginning of a project that value equals the Margin at Signature. But it can evolve overtime (up or down). In Conduite, setting a margin objective is the primary way to steer the performance of a project.
Expected Margin ($/%)	The margin that we expect to make on a project at any given time based on what was spent and what we think we need to spend to finish the work.

This is central feature of Conduite as it assumes a certain structure for your budgets.

Business Development Phase

Conduite **CRM** provides the **Expected Value (EV)** of your Business Development pipeline. It is the dollar amount that corresponds to the sum of the value of the opportunities weighted by their probability. In addition you get:

- The distribution of that Expected Value over time
- The distribution of the margin part of that Expected Value over time

This gives you a good idea of how much business in being generated. The Expected Value has a capacity equivalent that you can mostly find in the Capacity Planner. Mostly because not all opportunities have a corresponding Resourcing Request.

Execution Phase

During execution your main concern is not know whether your project is over (or under) budget.

The **Project Dashboard** is focused on answering that very question. I provides a single KPIs for that: **Execution Efficiency (EE)**.

It measures how efficiently your team is executing a project with respect to the margin objective they have. If they are 100% efficient it means that they will achieve □□ the margin objective. If they are below 100% □□, they will not achieve it. If they are above □□, they will surpass it.

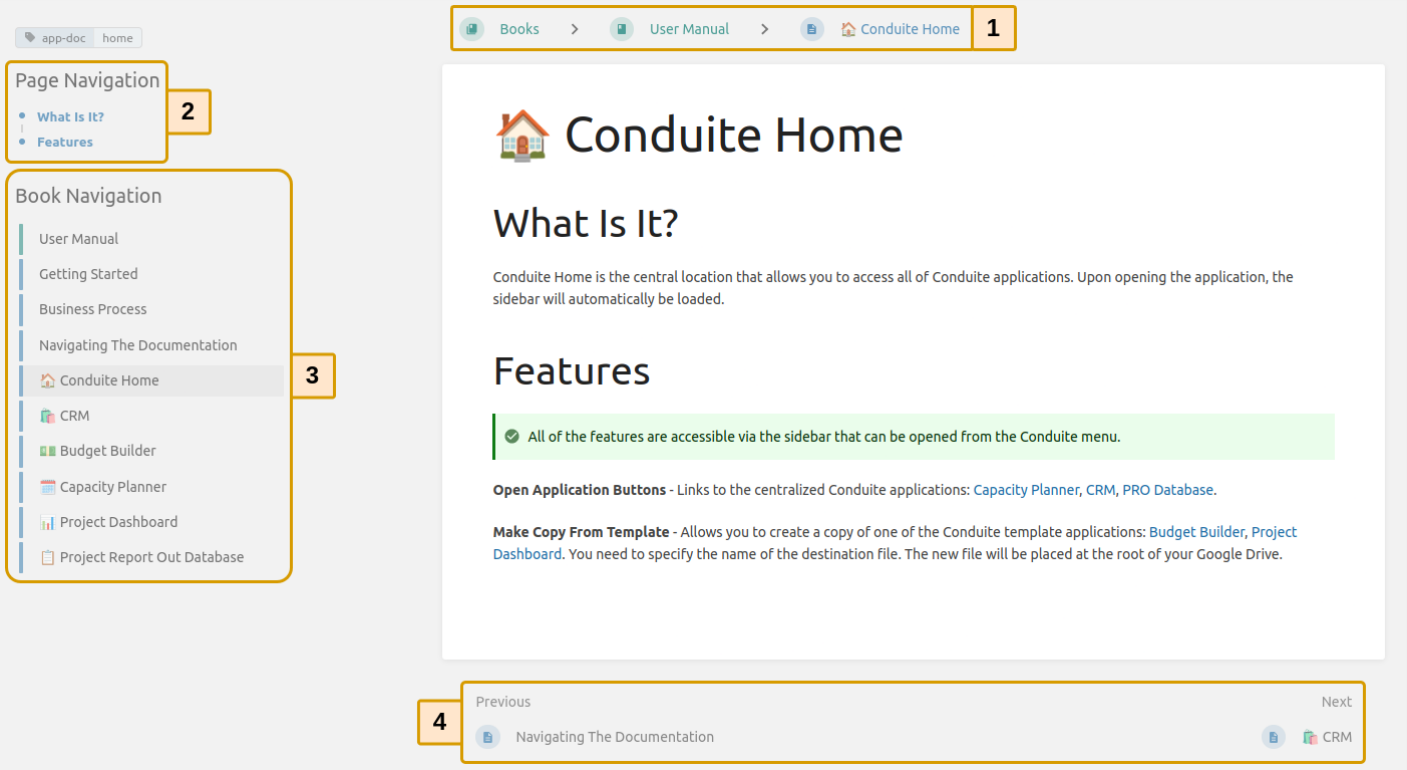
Execution Efficiency is a powerful KPI because it is relative to the margin objective. The latter might change over the course of a project but the team always knows that they need to hit 100% EE or above. That is the only KPI your team needs.

Navigating The Documentation

Navigation On Documentation Pages

Each documentation page provides several navigation features to help you get around:

1. **Breadcrumb** - Allows you to navigate through the documentation hierarchy.
2. **Page Navigation** - Allows you to quickly jump from one section to another within the page.
3. **Book Navigation** - Allows you to navigate another page within the same book.
4. **Next / Previous Page** - Allows you to navigate to the previous or next page in the book.



Application Documentation

All documentation pages for Conduite Applications follow the same structure in order to make it easier for you to navigate.

- **What Is It** - A brief description of the application and its purpose.
- **Key Concepts** - The list of key concepts that are needed to use the application. You can expand / collapse blocks individually by clicking on their top bar (see below). The content is pulled from the Glossary.
- **Key Performance Indicators** - The list of KPIs that the application computes or relies on.
- You can expand / collapse blocks individually by clicking on their top bar (see below). The content is pulled from the Glossary.
- **Using The Application**
  - **Typical Workflow** - The step-by-step description of the typical way users will use the application.
  - **Structure & Features** - A comprehensive description of the content of each tab of the application
  - **Conduite Addon** - A description of the features provided by the addon for the Conduite application.

Click Me To Expand / Collapse



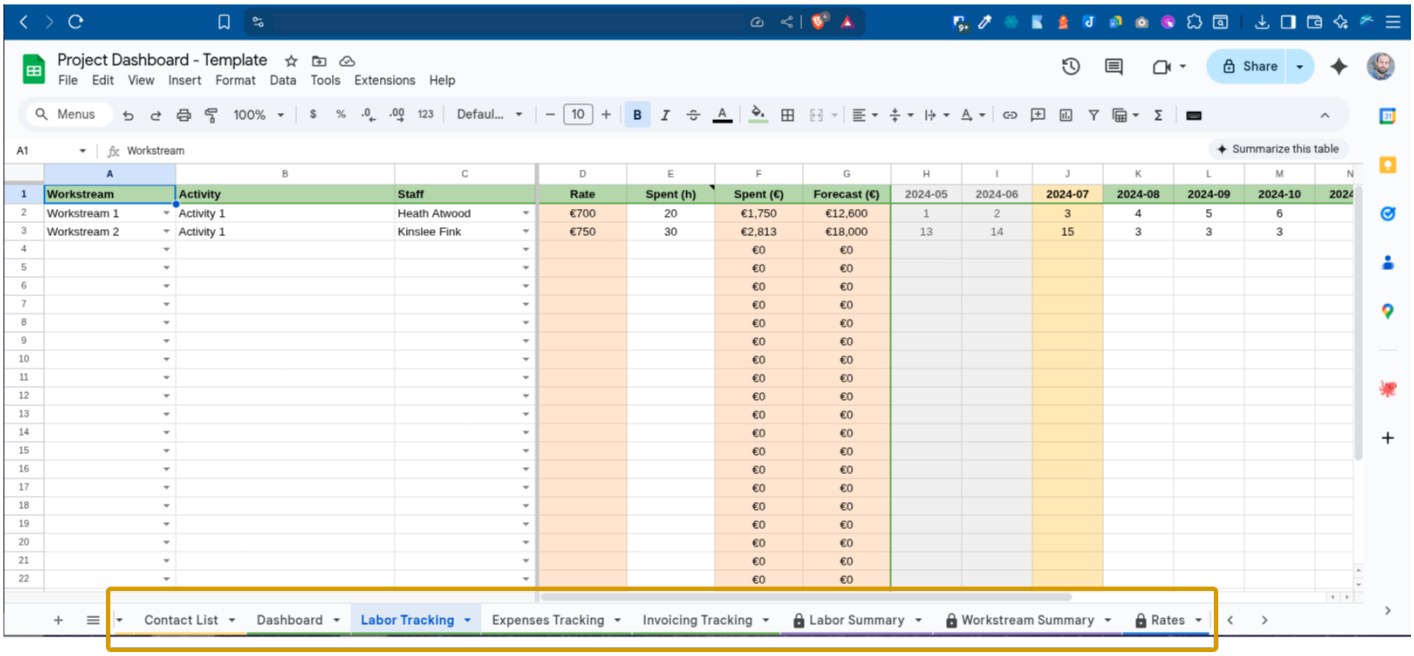
Well Done! There's always helpful information in such collapsible boxes.

Glossary

The Glossary is an important resource for Conduite users. It provides detailed definitions (and examples when relevant) of Key Concepts and Key Performance Indicators in Conduite. We encourage you to refer to it as often as needed, in particular in the beginning of your Conduite experience.

Anatomy Of A Conduite Application

Conduite applications are Google Spreadsheets. They are organized in sheets, each one of them having a specific purpose. In order to make this easier for the users, sheets are grouped by color, corresponding to a specific purpose.



Sheets of the Project Dashboard application

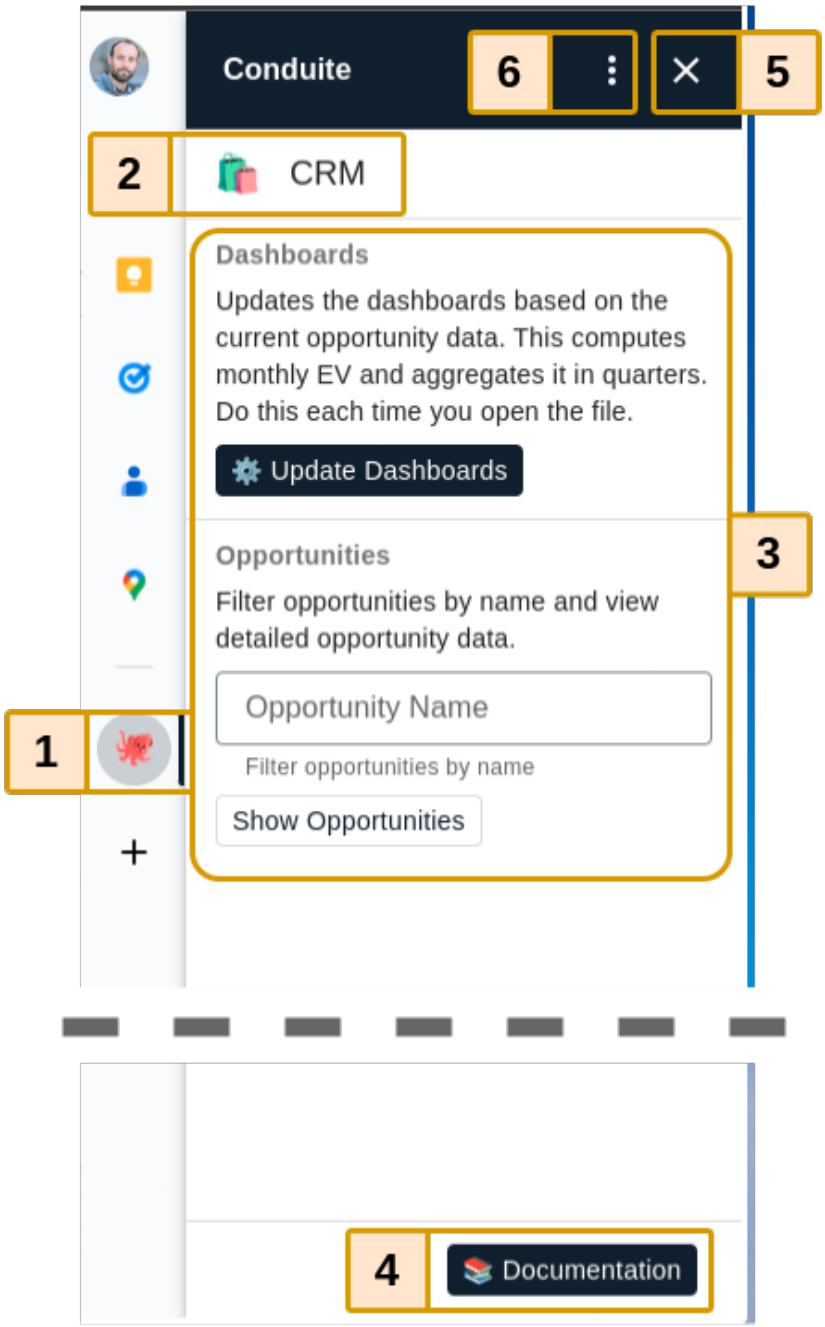
Color	Purpose
Yellow	Sheets with configuration data specific to the application (contract data, workstreams, ...). Only for CRM, Budget Builder and Project Dashboard applications. These sheets are mostly used when setting up the application.
Green	Sheets where users perform the actual data entry for the application. These are the most used sheets.
Purple	Read only sheets that provide statistics, summarized data and tables. These sheets are used in conjunction to the green ones.
Blue	Sheets with global configuration data (rates, roles, contract types, ...). These sheets are mostly used when setting up the application.

Color	Purpose
Red	System sheets. Read only. Hidden by default. **Must not be modified**.

Anatomy Of The Conduite Google Workspace™ Addon

The Conduite Addon displays different content depending on the Conduite application you open it from. The structure remains identical regardless of the Conduite application.

1. The button that opens up the Addon, located in the Addon sidebar (right side) of your Google Sheets™ file.
2. The name of the Conduite application
3. The core of the addon from which you access the features specific to the application you are using
4. A button that will open the documentation page for the application (new tab)
5. The button to close the addon
6. The button to open the addon menu, with the following options
    - Conduite Website - Opens a new tab to the Conduite website
    - Report An Issue - Opens a new tab to the ticket submission form
    - Refresh - Reloads the addon


Conduite
6
5
2
CRM
Dashboards
Updates the dashboards based on the current opportunity data. This computes monthly EV and aggregates it in quarters. Do this each time you open the file.
Update Dashboards
Opportunities
3
Filter opportunities by name and view detailed opportunity data.
Opportunity Name
1
Filter opportunities by name
Show Opportunities
4
Documentation