Our ProAutomated Partnership Process

How We Do It

1. **Let's Agree**
   Let's make sure we agree on the terms and scope of our partnership, including rates and legal details. We'll sign a Service Agreement and send you the W9, COI, and NDA you require from us.

2. **Internal Teamwork**
   We'll set up a conference call between our internal teams to provide clarity around the operating details — including scheduling, invoicing, management structures, communication expectations, project escalation process, and any other details we need to communicate along the way.

3. **Training**
   Almost there! We'll get our On-Site Engineers trained to your specific way of doing things, with a focus on documentation, reporting, and communication standards. This training will include some of the following: in-person training at your office, remote webinars, and on-the-job training with your Controls Engineers. The best part — it is entirely at our cost.

4. **The First Project**
   We made it! During this and future projects, we'll have a team making sure we are clear on scope, timeline, and any project specific details and skills needed. From there, we'll work internally to make sure we are ready to add value from day one to our first project.

5. **The Future**
   Our lasting partnership will be built on trust and communication. We'll work together to establish open channels for feedback, both good and bad. We'll also work to keep our On-Site Engineers who have worked with you available just to you as much as possible.

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Questions We Ask

1 Let's Agree

Typical paperwork required: Service Agreement, W9, COI, NDA
Is there any company specific paperwork you will require?
Who should we be in contact with from your organization about paperwork?

2 Internal Teamwork

How will you schedule our On-Site Engineers?
How do you process invoices? What information do you need?
Can you describe how your internal team is structured?
Can you describe a typical project and how you see us being involved?
How often would you like us to be in communication with you?

3 Training

Here is some typical content covered in most customer trainings:
- Specific and unique technical skills required
- Customer documentation and reporting process
- Project escalation process

What will our training look like? Will it be a mixture of office, remote and on-the-job training?
How will you know we are ready for independent work that adds value to your projects?

4 The First Project

What is the scope and timeline for this project?
Will we be working alongside one or more of your engineers?
What kinds of documentation and reporting do you require for this and other projects?

5 The Future

How often would you like us to be in communication with you?
Are there any busy times of year we should be aware of and plan for?
What skills and activities can we add to our team to be of even more value to you?