DEV-PRO
OUTSOURCE SOFTWARE DEVELOPMENT

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www.dev-pro.net

DRAFTs

Guideline

Version	Date	Change Log
1.0	June 11, 2013	First version of the document
2.0	Sep 17, 2014	Importance of DRAFT system explained, examples added. List of Authorised people updated
2.1	Oct 2, 2014	Paragraph 6 added to declare rules on DRAFTs approving during Dev-Pro President's absence.
2.2	Mar 22, 2017	Paragraph 4.4. Updated to clarify the necessity to include future sender's signature block to the DRAFT in case it is prepared for someone else.

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1. Introduction

The purpose of this guideline is to document the rules related to DRAFT email message preparation and approval procedures, explain the reasons why they are required and provide examples. This guideline is primarily aimed at Dev-Pro Project Managers, HR, Team Leads and other team members who are corresponding with Dev-Pro potential and existing Clients directly.

2. Importance of DRAFT email messages

DRAFT system is aimed to ensure that only accurate and exact information / data is provided to our Clients and to eliminate business risks, related to miscommunication between Dev-Pro representative and a Client. If you tell Client we need 27 hours while this is a misprint and we need 72, it may result into unbillable work for the company or we will look unprofessional admitting that we sent incorrect info. DRAFT system ensures that such mistakes are caught and corrected internally before they get to the Client.

3. Approving DRAFT email messages

3.1. In which cases DRAFT procedure is required?

Every email message sent to Dev-Pro.net Lead / Client / Partner (going forward "Client") should be approved by an Authorised person before sending unless it was specifically agreed with the Authorised person that email message can be sent without DRAFT procedure.

3.2. Who is Authorised to approve DRAFT email messages?

3.2.1. Definition of Authorised Person

Here and further, **Authorised person** is a person, who can approve DRAFT email messages. It is a person who has a wide picture and visibility, which allows this person to make an appropriate judgment whether the information provided in the email is accurate and corresponds to the Company vision / goals / approaches.

3.2.2. List of Authorised people to approve DRAFTs

Name	Email	Title	General Authority / Rule
Jeff Bianco	jeff@dev-pro.net	President	All email messages which discuss business related topics, strategic decisions, pricing information can't be sent without Jeff's approval. **Note!** Jeff is also an Authorised person to approve general project email messages in

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			case Maxim is not available or information provided to the Client must be approved by Company President (e.g. project estimate).
Maxim Kortunov	maxim@dev-pro.net	CTO	Maxim is an Authorised person to approve all project related email messages (estimates, planning, team composition, technical emails and etc.).

3.3. Approving DRAFT emails with several Authorised people

There will be situations when you are sending a DRAFT email message to several Authorised people. Clearly state above the DRAFT header whose approval you expect is enough. This will ensure that you don't send an email message which requires approval of all Authorised people after you received the first one, and you don't waste time waiting for not required approval.

When you receive a response from one of the Authorised people, you will need to identify if you should wait for other approvals. You can base your judgment on the rules below.

Authorised Person's reply	Rule / Comment
No comments	If Authorised person writes "no comments" that means that he neither approves nor rejects the email message but maybe didn't read it or doesn't know enough about the topic to approve / comment on it.
OK	If Authorised person writes "OK" that means it is OK with him. It may be enough if you expect only his approval, or not enough if you stated that you expect several approvals.
Ok to send	If Authorised person writes "OK to send" that means you don't need to wait for other approvals. Even if you initially expected several approvals, this reply overrides it.
Update then send	If Authorised person writes "Update then send", it means that he has already addressed the comments and made changes to your DRAFT email message. In such case no further DRAFT is required, but you should properly format the email message (if you use Gmail, please, carefully check the guideline: Documentation Management - Guideline - How to write well-formatted emails in Gmail) and send it.
Up to… / Wait for...	If Authorised person writes such reply, this means that approval of the stated person is required and at the same time

	is enough.

4. How to prepare a DRAFT email message

4.1. Expected Approvals

Rule: In case you send email message to several Authorised people, it is required to clearly state whose approval you expect is enough.

Example:

From: John Doe <jchn.doe@dev-pro.net>
Sent: Thursday, February 09, 2012 5:20 AM
To: Jeff Bianco <jeff@dev-pro.net>, Maxim Kortunov <maxim@dev-pro.net>
Subject: DRAFT: Personal assistant for Bob
Attachment: Assistant Responsibilities list.xls

Expected approvals: either Jeff or Maxim

From: John Doe [mailto: john.doe@dev-pro.net]
To: Bob@domain.com
Cc: Jeff Bianco <jeff@dev-pro.net>, Maxim Kortunov <maxim@dev-pro.net>
Subject: Personal assistant for Bob

Hi Bob,
Sorry for a delay. This email is to provide you with comments regarding the position of your personal remote assistant. [.....]

4.2. Subject Line

Rule: Subject of the DRAFT email message should start with the word "DRAFT". If you send the updated DRAFT, then you should start subject line with words "UPDATED DRAFT" and the number of it (2, 3, 4, etc). The number will show the round of updates until the email message is approved by Authorised person. The number should not be in quotes or brackets.

Note: Make sure to remove label "DRAFT" from the Subject line when sending an email message to the client.

Example:

Good Example

DRAFT: Assistant for Bob

Updated DRAFT 2: Assistant for Bob

Updated DRAFT 3: Assistant for Bob

Bad Example

For review: Assistant for Bob

Assistant for Bob - draft

DRAFT 2: Assistant for Bob - draft

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4.3. Body of the DRAFT email message

Rule: Body of the DRAFT email message should contain the following fields: "**From:**", "**To:**", "**CC:** (if any)", "**Subject:**", "**Attachments:** (if any)", "**Body of the email:**". This structure will allow Authorised Person to see the whole picture and to review / approve not only the body of your email message, but also its recipients, subject line, attachments, etc.

Example:

4.4. DRAFT is a CLEAN Email Message

Rule: DRAFT should be a clean email message. No extra stuff below (e.g. remove additional comments / remarks from Authorised Person which might appear after first round of review). Your DRAFT should look underline exactly like an email message that you will send to the Client.

Note 1: You may need to prepare a DRAFT of reply to some particular email message. In this case, keep the email thread in the bottom of your DRAFT. Keep exactly the thread as the Client will see it. It is important as Authorised person will be able to check previous correspondence details in several seconds instead of searching the inbox for the initial email message.

Note 2: Make sure that there are no internal comments left accidentally in your DRAFT email message. Remember that Authorised person may need to send a DRAFT email message for

you and leaving internal comments may cause awkward situations if such comments accidentally go to client.

Example:

4.5. Signature in DRAFT email message

Rule: DRAFT should have a signature block. Thus you make sure that Authorised Person can notice mistakes in it (e.g. different fonts in the email message and signature).

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Note! In case you are preparing a DRAFT which should be sent from someone else than you, you should include this person's signature block to your DRAFT, not yours. This way, you make sure that the DRAFT looks exactly as the email which should be sent, and it can be forwarded easier by other person in case of need, especially from the mobile device.

4.6. Example of DRAFT email message

From: John Doe <john.doe@dev-pro.net>
Sent: Thursday, February 09, 2012 5:20 AM
To: Jeff Bianco <jeff@dev-pro.net>, Maxim Kortunov <maxim@dev-pro.net>
Subject: DRAFT: Personal assistant for Bob
Attachment: Assistant Responsibilities list.xls

Expected approvals: either Jeff or Maxim

From: John Doe [mailto:john.doe@dev-pro.net]
To: Bob@domain.com
Cc: Jeff Bianco <jeff@dev-pro.net>, Maxim Kortunov <maxim@dev-pro.net>
Subject: Personal assistant for Bob

Hi Bob,
Sorry for the delay. This email is to provide you with comments regarding the position of your personal remote assistant. [.....]

[.....] We can have a call to discuss the details in a time convenient for you.

_____

John Doe
Project Manager | Dev-Pro.net
Phone: +1 (310) 362-0206
Mobile: +380 (95) 000-0000
Skype: dev-pro.john.doe

5. Getting your DRAFT approved

It is your responsibility to ensure that your DRAFT gets approved and email is sent. Authorised people will need time to review and approve your email message, also some changes may be required after the first round of review. Remember this when sending DRAFT for approval.

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Don't send draft then go home. You need a plan to get a response and send. Contact Authorised Person via Skype, text, phone if needed to get an approval and to send the email message before leaving the office.

6. Rules on approving your DRAFT when Dev-Pro President is not available

Dev-Pro.net President travels a lot and you can come across the situation when he is not available, but his approval is needed for a specific DRAFT. If so, you should act according to the rules provided below.

> **Urgent emails** (client reported critical problem which need to be addressed, time sensitive email message, etc.) - use your judgment and get approval from Dev-Pro CTO or Delivery Director or Delivery Manager (for project-related correspondence) to send email without Dev-Pro President's approval;

> **Normal priority emails** - if an email message can wait for Dev-Pro President's approval and is not time sensitive, better to wait. If Dev-Pro President can't approve your draft to be sent within a business day, approve draft with Dev-Pro CTO or Delivery Director or Delivery Manager (for project-related correspondence);

> **Low priority, no time-sensitive emails** - can wait for Dev-Pro President's approval.

> **Note!** All emails which discuss business related topics, strategic decisions, pricing information can't be sent without Dev-Pro President's approval.

Feedback on the guideline
If you have any comments/suggestions/questions or noticed a mistake in the guideline, please send us your feedback by filling the **form**.