



Osprey Approach: Professional Services Process/Procedure

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The latest version is always online at
<https://support.ospreyapproach.com/?p=59528>



This guide will take you through the process of requesting professional services from the Osprey team

You have the option with Osprey to request professional services as an added extra. This can include the creation of documents, workflows and even reports etc.

Requesting Professional Services

Should you require us to provide professional services such as creation of your standard documents, a workflows or a bespoke report on Osprey you may request this by getting in touch by email or calling our support department. You will need to provide accurate details of what is required and will be required to fill in our professional services form.

Osprey Approach

Professional Services – Specification Form

Client Name	
Contact Name	
Signatory	
Detailed specification of work	
Please provide as much information as possible, including worktypes, document names, workflows names. Please provide the IDs where possible.	
If there are multiple documents/workflows, we will also need to obtain the quantity.	
<i>e.g. Please replace the following 15 documents in the Conveyancing Purchase Workflow on Worktype Residential Conveyancing with templates provided below</i>	
<ul style="list-style-type: none">- Client Care Letter- Welcome Letter	
Desired Outcome	
What are you looking to achieve? This will help identify the best course of action.	
<i>e.g. To run the conveyancing workflow with your firm's custom letter templates.</i>	

Internal Office Use – To be completed by Osprey	
Time required to complete work	
Volume of documents to be amended	
Any further work required (Please note here e.g. map to InfoTrack)	Yes/No
Expected Completion date	
Estimated cost of work required	£
Credits/Invoice	
Support Team Member Assigned	

If you would like to fill this in prior to any conversations you may download a copy here:

Specification-form-Professional-services-work [Download](#)

Quotation

Once the professional services form has been completed and returned we will assess the work and time required to complete and provide you with a quotation. If you have Osprey credits you may use some or all of these to pay towards cost.

Scheduling

Upon receipt of the signed quotation and agreement of payment, we will schedule in the work to be completed. This will be in line with our resources availability. You will be informed on this so you have a clear understanding of when this will be complete.

Completion/Sign Off

Once the work has been completed a meeting will be arranged with yourselves. This will go through and sign off the completion.