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(54) SYSTEMS AND METHODS FOR PROFESSIONAL SERVICES PROCUREMENT

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(52) **U.S. Cl.** **705/7.17**; 705/7.13; 705/7.14

(57) **ABSTRACT**

Disclosed herein are systems and methods for selling, provisioning, transacting, fulfilling, delivering and supporting simple and complex business and technical professional services in an on demand fashion for various service industries specifically around the development life cycle relative to the industry. On demand professional services are accomplished through a system which allows services to be administered from a plurality of specialized consultants to end clients via a 'retail type' framework built upon a converged Internet, call center, telecommunications and ancillary software platform. The on demand architecture enables clients to purchase professional services on a just in time basis by simply calling a call center or visiting the professional services entity on the web. Clients can: 1) receive advice; 2) invite consultant(s) to participate in meetings; 3) outsource paper deliverables; 4) receive research; and/or 5) outsource full projects. Consultants are likewise able to fulfill and deliver services in real time.

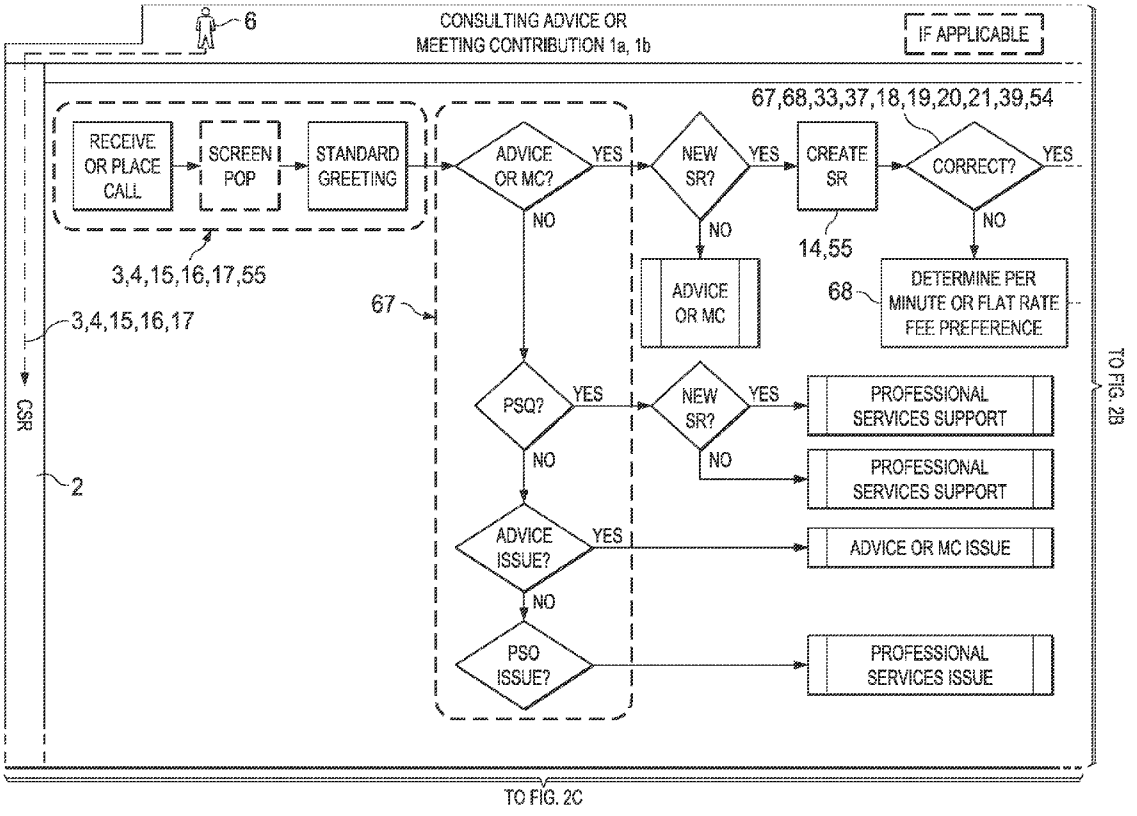


FIG. A
HOW TO PROCURE PROFESSIONAL SERVICES

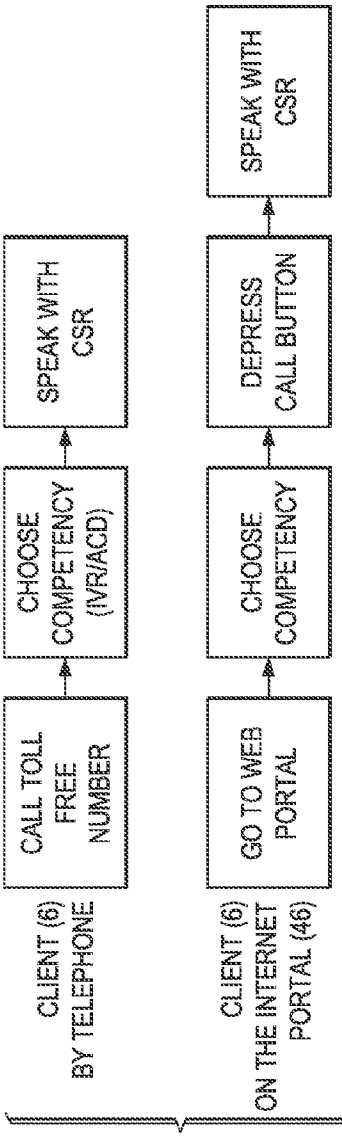


FIG. B
HOW TO TRANSACT PROFESSIONAL SERVICES

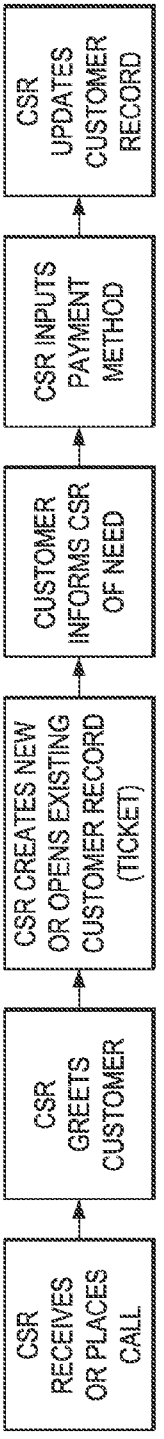


FIG. 2

FIG. 2A	FIG. 2B
FIG. 2C	FIG. 2D

FIG. 3

FIG. 3A	FIG. 3B
FIG. 3C	FIG. 3D

FIG. 4

FIG. 4A	FIG. 4B
FIG. 4C	FIG. 4D

FIG. 5

FIG. 5A	FIG. 5B
FIG. 5C	FIG. 5D

FIG. 6

FIG. 6A	FIG. 6B
FIG. 6C	FIG. 6D

FIG. C

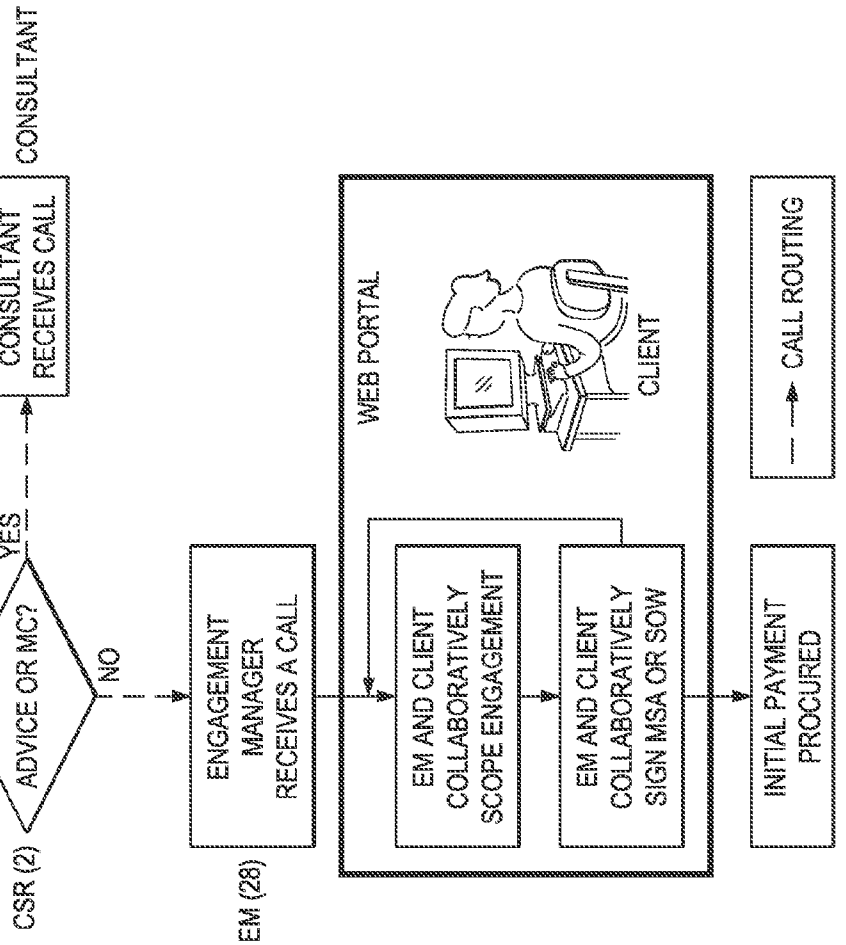


FIG. D

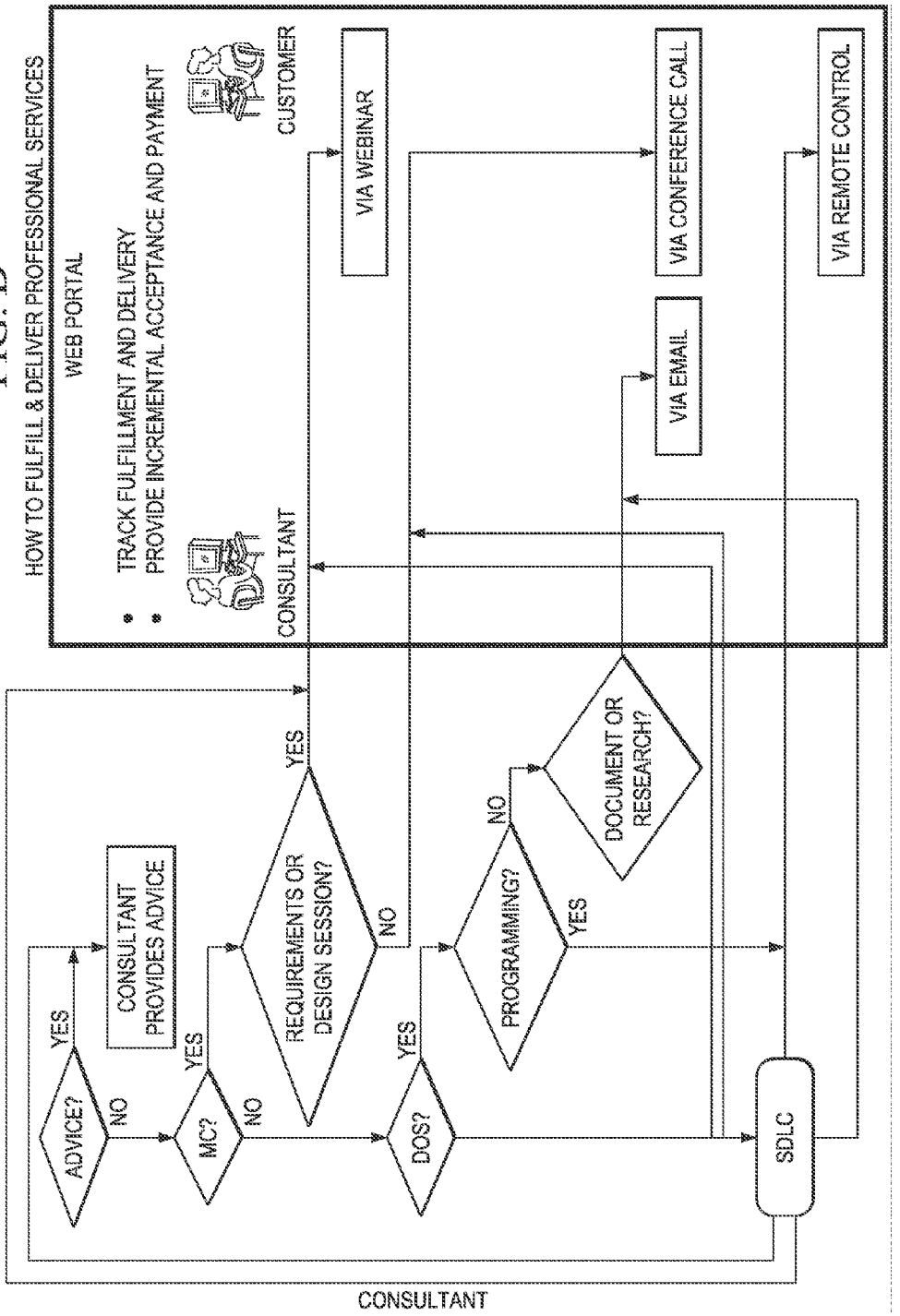
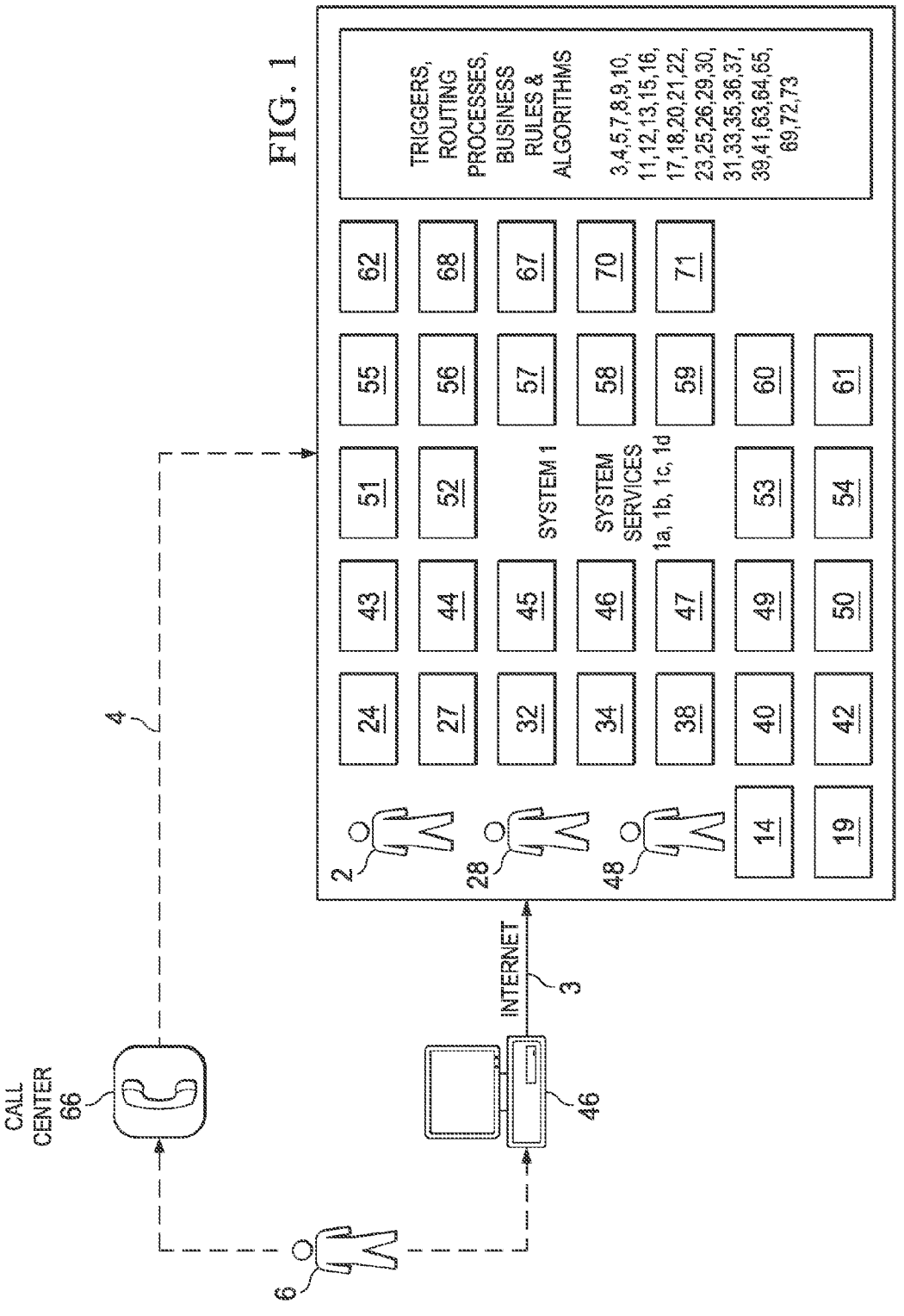

HOW TO FULFILL & DELIVER PROFESSIONAL SERVICES
WEB PORTAL
TRACK FULFILLMENT AND DELIVERY
PROVIDE INCREMENTAL ACCEPTANCE AND PAYMENT
CONSULTANT
CUSTOMER
VIA WEBINAR
VIA EMAIL
VIA CONFERENCE CALL
VIA REMOTE CONTROL
ADVICE?
YES
NO
CONSULTANT PROVIDES ADVICE
MC?
YES
NO
REQUIREMENTS OR DESIGN SESSION?
YES
NO
DOS?
YES
PROGRAMMING?
YES
NO
DOCUMENT OR RESEARCH?
SDLC
CONSULTANT

FIG. 1


TRIGGERS, ROUTING PROCESSES, BUSINESS RULES & ALGORITHMS
3,4,5,7,8,9,10, 11,12,13,15,16, 17,18,20,21,22, 23,25,26,29,30, 31,33,35,36,37, 39,41,63,64,65, 69,72,73
62
68
67
70
71
55
56
57
58
59
60
61
51
52
53
54
SYSTEM 1
SYSTEM SERVICES
1a, 1b, 1c, 1d
43
44
45
46
47
49
50
24
27
32
34
38
40
42
14
19
2
28
48
4
INTERNET
3
CALL CENTER
66
46
6

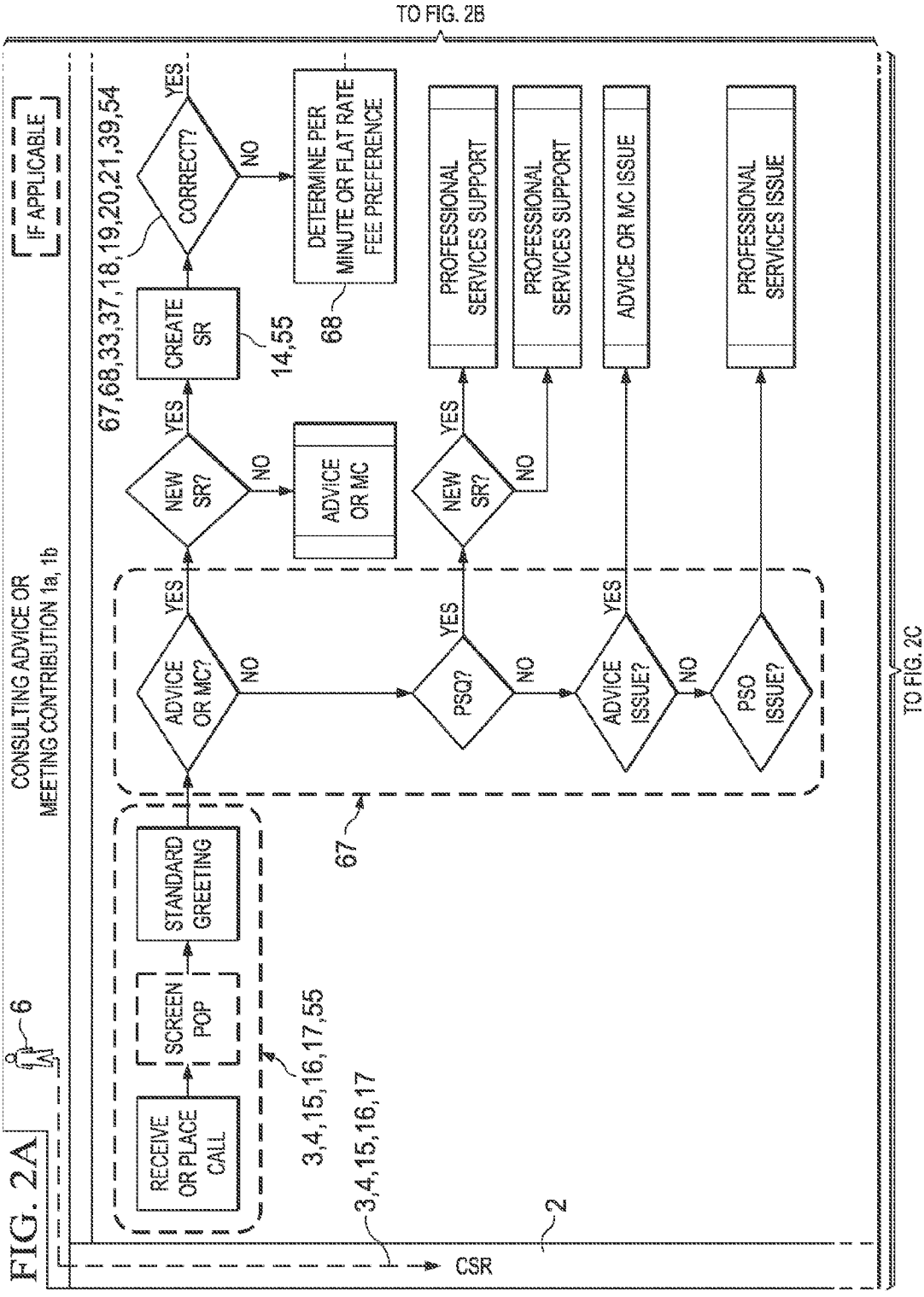
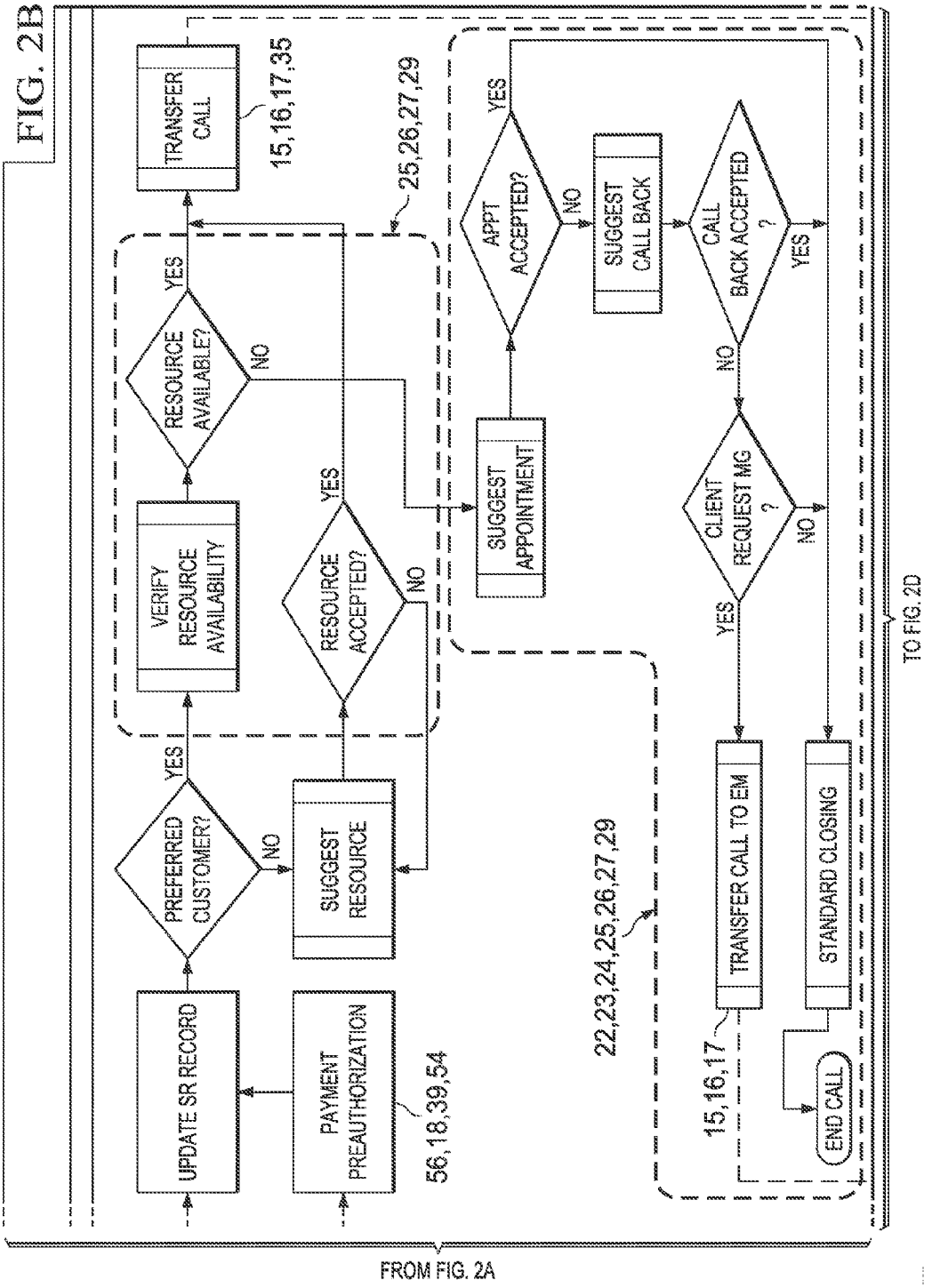

TO FIG. 2B
CONSULTING ADVICE OR MEETING CONTRIBUTION 1a, 1b
IF APPLICABLE
67,68,33,37,18,19,20,21,39,54
RECEIVE OR PLACE CALL
SCREEN POP
STANDARD GREETING
ADVICE OR MC?
NEW SR?
ADVICE OR MC
CREATE SR
CORRECT?
DETERMINE PER MINUTE OR FLAT RATE FEE PREFERENCE
PSO?
PROFESSIONAL SERVICES SUPPORT
ADVICE ISSUE?
ADVICE OR MC ISSUE
PSO ISSUE?
PROFESSIONAL SERVICES ISSUE
YES
NO
14,55
68
67
6
3,4,15,16,17,55
3,4,15,16,17
2
CSR
TO FIG. 2C

FIG. 2A

FIG. 2B


FROM FIG. 2A
UPDATE SR RECORD
PAYMENT PREAUTHORIZATION
56,18,39,54
PREFERRED CUSTOMER?
YES
NO
SUGGEST RESOURCE
VERIFY RESOURCE AVAILABILITY
RESOURCE AVAILABLE?
YES
NO
TRANSFER CALL
15,16,17,35
RESOURCE ACCEPTED?
YES
NO
25,26,27,29
SUGGEST APPOINTMENT
APPT ACCEPTED?
YES
NO
SUGGEST CALL BACK
CALL BACK ACCEPTED ?
YES
NO
CLIENT REQUEST MG ?
YES
NO
22,23,24,25,26,27,29
15,16,17
TRANSFER CALL TO EM
STANDARD CLOSING
END CALL
TO FIG. 2D

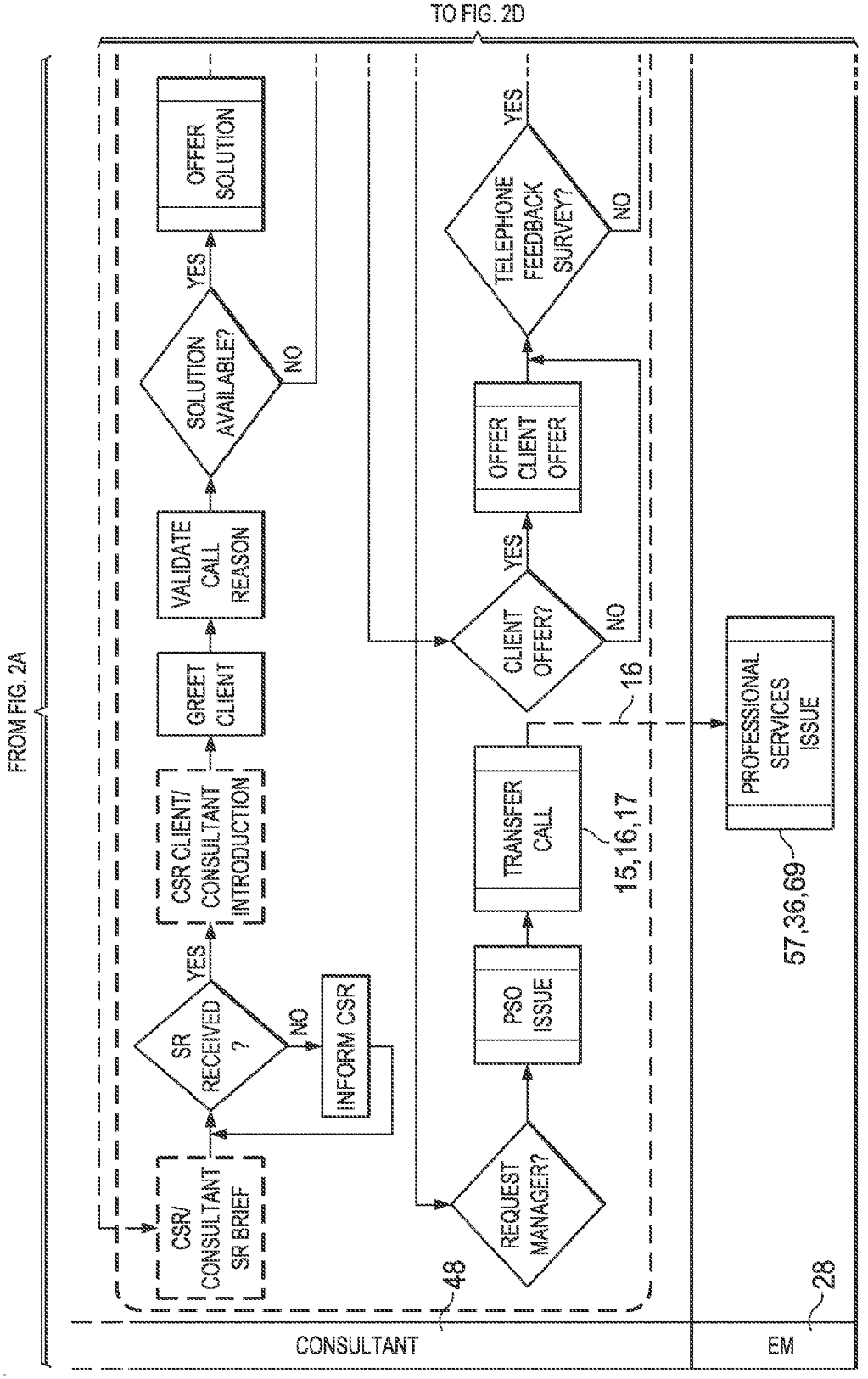

TO FIG. 2D
FROM FIG. 2A
CSR/ CONSULTANT SR BRIEF
SR RECEIVED ?
YES
NO
INFORM CSR
CSR CLIENT/ CONSULTANT INTRODUCTION
GREET CLIENT
VALIDATE CALL REASON
SOLUTION AVAILABLE?
YES
NO
OFFER SOLUTION
REQUEST MANAGER?
PSO ISSUE
TRANSFER CALL
15,16,17
CLIENT OFFER?
YES
NO
OFFER CLIENT OFFER
TELEPHONE FEEDBACK SURVEY?
YES
NO
16
PROFESSIONAL SERVICES ISSUE
57,36,69
48
28
CONSULTANT
EM

FIG. 2C

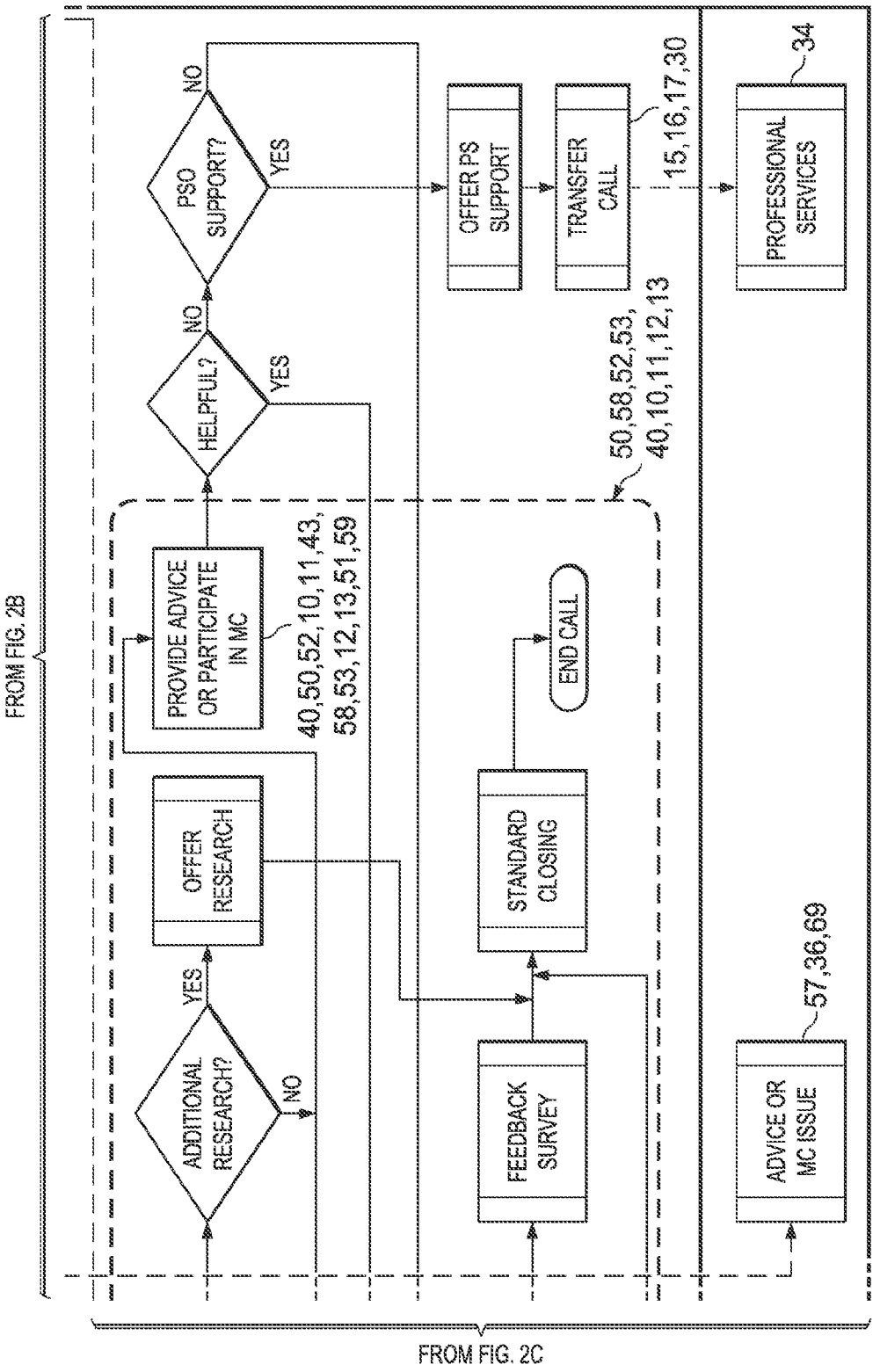

FROM FIG. 2B
ADDITIONAL RESEARCH?
YES
NO
OFFER RESEARCH
PROVIDE ADVICE OR PARTICIPATE IN MC
40,50,52,10,11,43,
58,53,12,13,51,59
HELPFUL?
YES
NO
PSO SUPPORT?
YES
NO
50,58,52,53,
40,10,11,12,13
OFFER PS SUPPORT
TRANSFER CALL
15,16,17,30
PROFESSIONAL SERVICES
34
STANDARD CLOSING
END CALL
FEEDBACK SURVEY
ADVICE OR MC ISSUE
57,36,69
FROM FIG. 2C

FIG. 2D

FIG. 3A

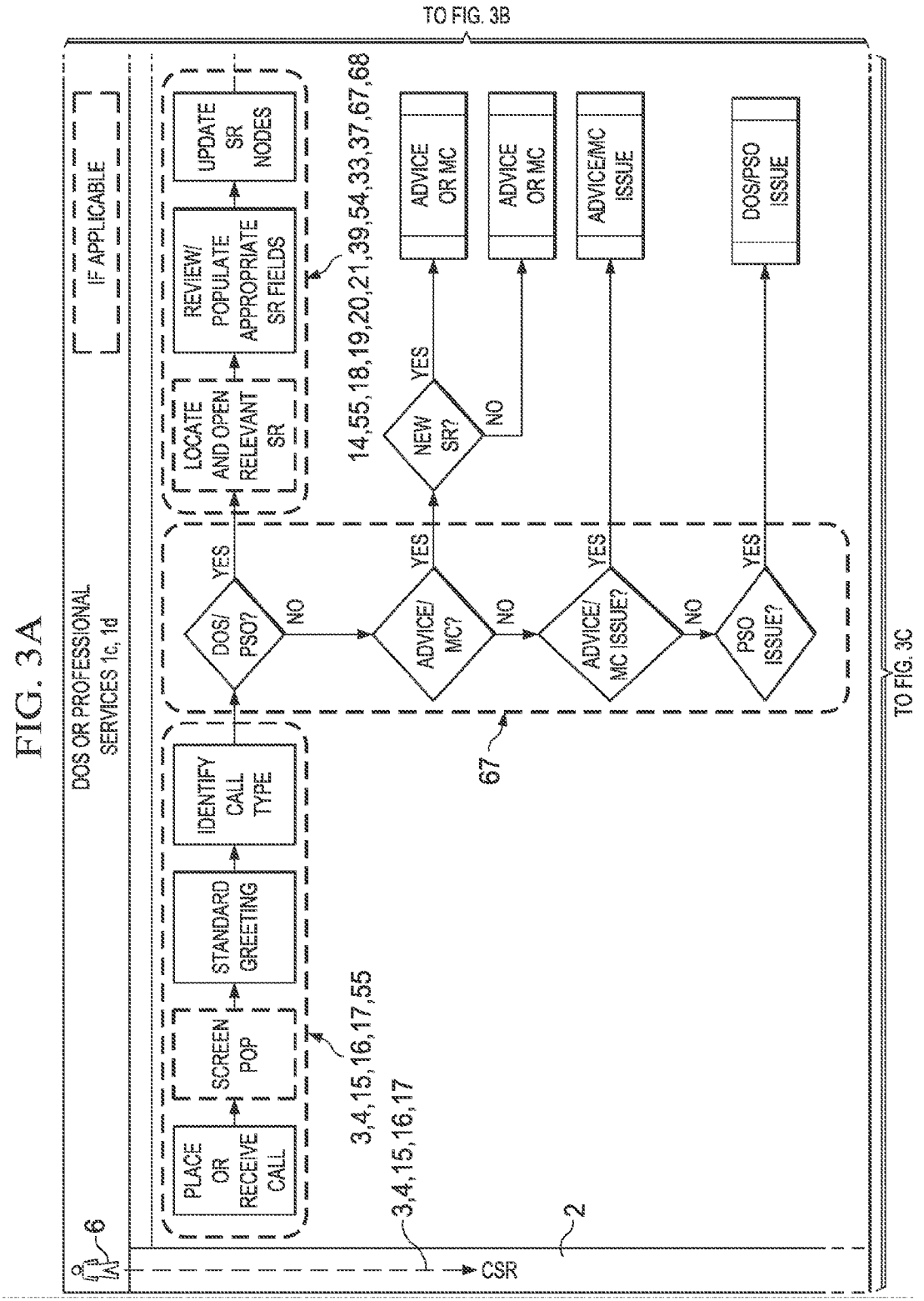

TO FIG. 3B
DOS OR PROFESSIONAL SERVICES 1c, 1d
IF APPLICABLE
PLACE OR RECEIVE CALL
SCREEN POP
STANDARD GREETING
IDENTIFY CALL TYPE
DOS/ PSO?
YES
NO
LOCATE AND OPEN RELEVANT SR
REVIEW/ POPULATE APPROPRIATE SR FIELDS
UPDATE SR NODES
ADVICE/ MC?
NEW SR?
ADVICE OR MC
ADVICE OR MC
ADVICE/ MC ISSUE?
ADVICE/MC ISSUE
PSO ISSUE?
DOS/PSO ISSUE
3,4,15,16,17,55
3,4,15,16,17
14,55,18,19,20,21,39,54,33,37,67,68
67
2
6
CSR
TO FIG. 3C

FIG. 3B

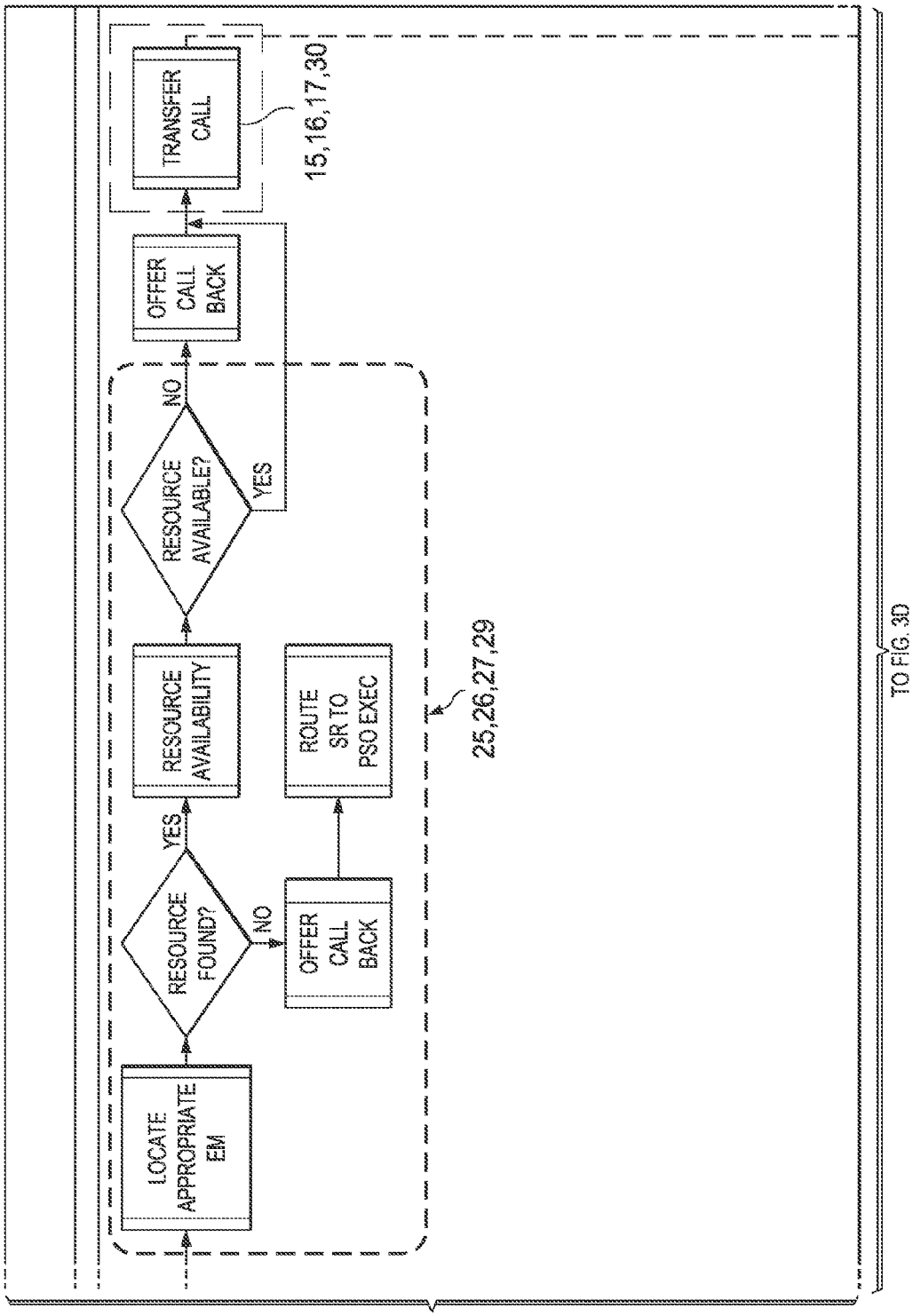

LOCATE APPROPRIATE EM
RESOURCE FOUND?
YES
NO
RESOURCE AVAILABILITY
OFFER CALL BACK
ROUTE SR TO PSO EXEC
RESOURCE AVAILABLE?
NO
YES
OFFER CALL BACK
TRANSFER CALL
15,16,17,30
25,26,27,29
FROM FIG. 3A
TO FIG. 3D

FIG. 3C

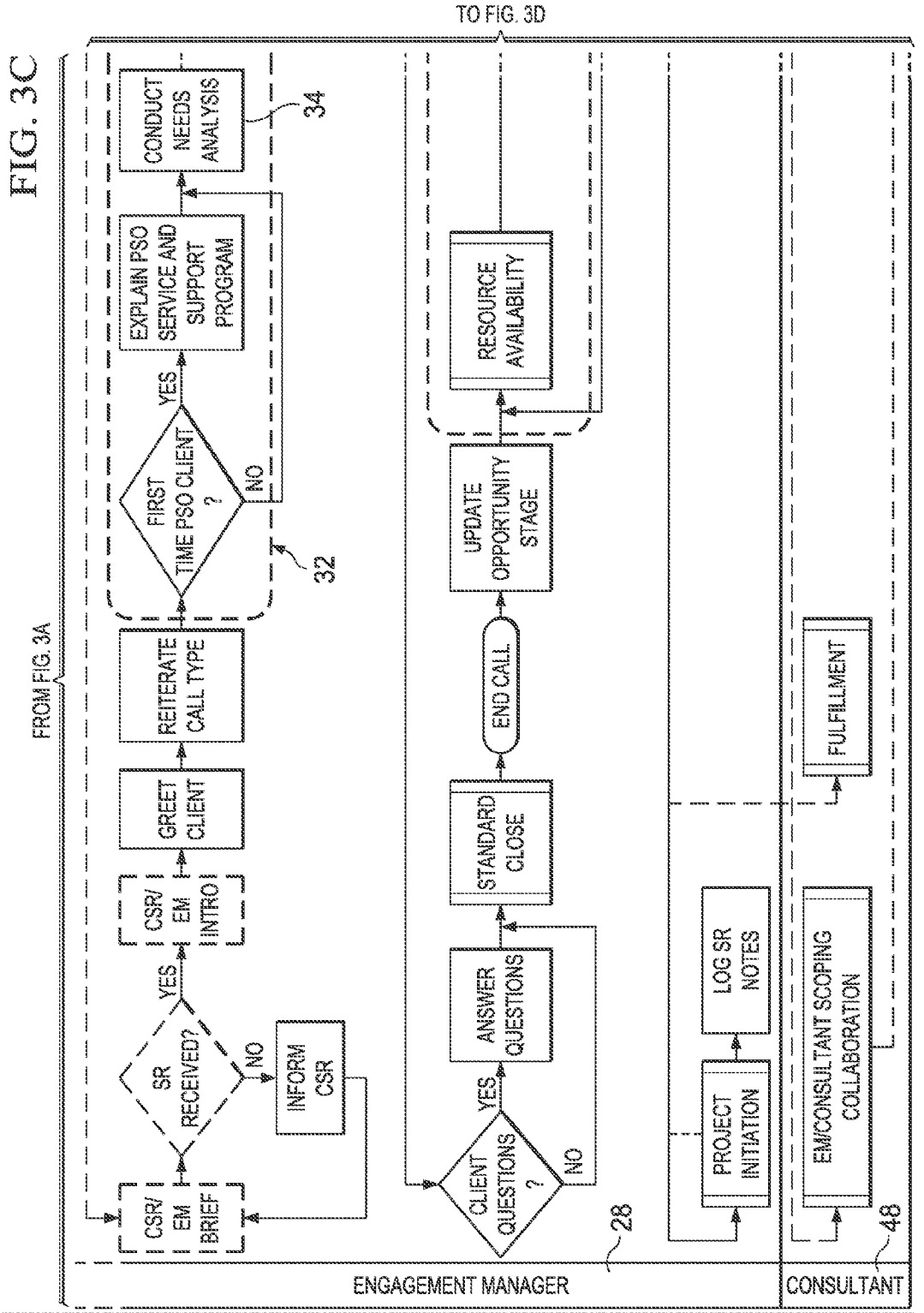

FROM FIG. 3A
TO FIG. 3D
ENGAGEMENT MANAGER
CONSULTANT
CSR/ EM BRIEF
SR RECEIVED?
YES
NO
INFORM CSR
CSR/ EM INTRO
GREET CLIENT
REITERATE CALL TYPE
FIRST TIME PSO CLIENT ?
YES
NO
EXPLAIN PSO SERVICE AND SUPPORT PROGRAM
CONDUCT NEEDS ANALYSIS
32
34
CLIENT QUESTIONS ?
YES
NO
ANSWER QUESTIONS
STANDARD CLOSE
END CALL
UPDATE OPPORTUNITY STAGE
RESOURCE AVAILABILITY
PROJECT INITIATION
LOG SR NOTES
EM/CONSULTANT SCOPING COLLABORATION
FULFILLMENT
28
48

FIG. 3D

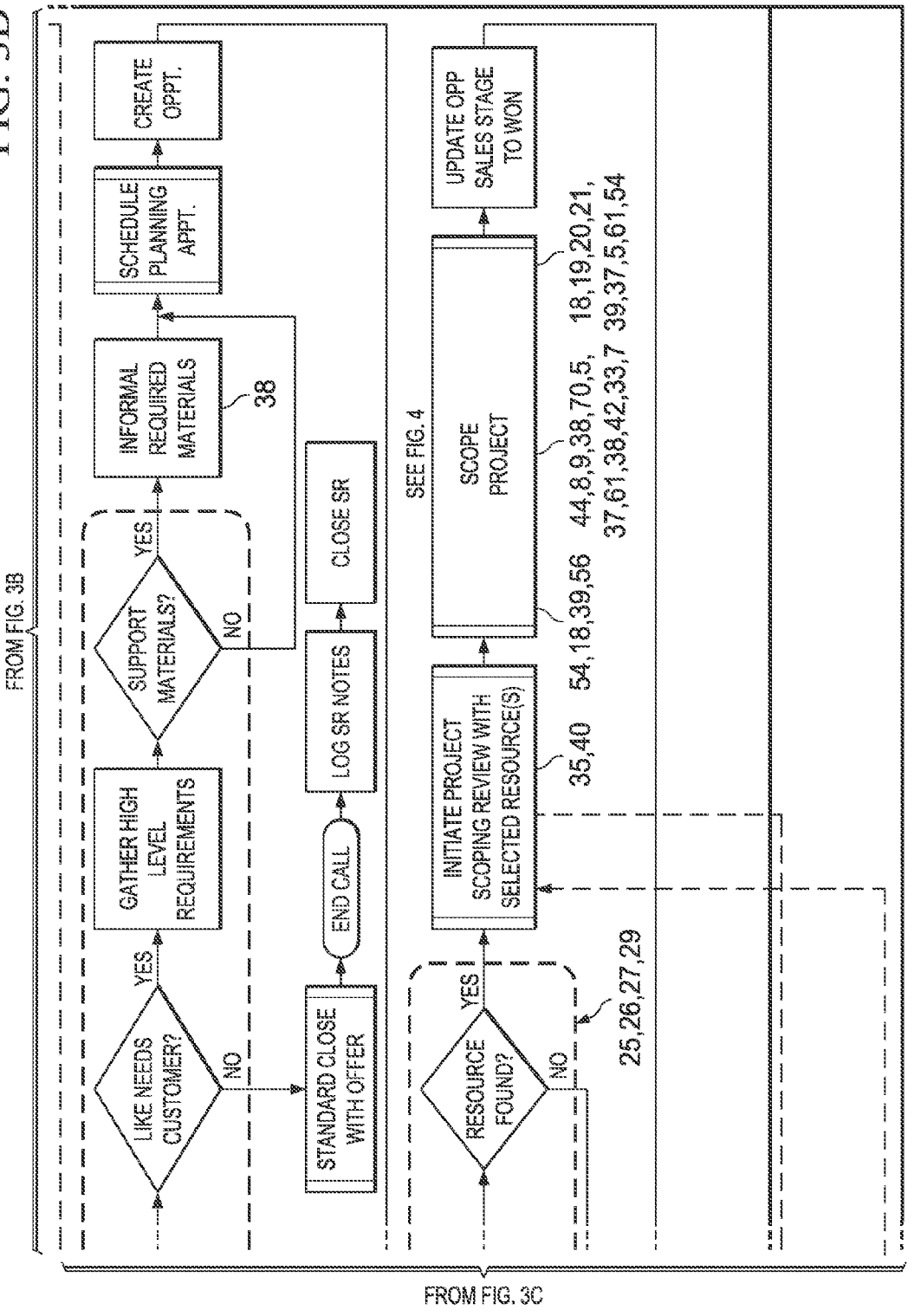

FROM FIG. 3B
LIKE NEEDS CUSTOMER?
YES
NO
GATHER HIGH LEVEL REQUIREMENTS
SUPPORT MATERIALS?
YES
NO
INFORMAL REQUIRED MATERIALS
38
SCHEDULE PLANNING APPT.
CREATE OPPT.
STANDARD CLOSE WITH OFFER
END CALL
LOG SR NOTES
CLOSE SR
SEE FIG. 4
RESOURCE FOUND?
YES
NO
INITIATE PROJECT SCOPING REVIEW WITH SELECTED RESOURCE(S)
SCOPE PROJECT
UPDATE OPP SALES STAGE TO WON
25,26,27,29
35,40
54,18,39,56
44,8,9,38,70,5,
37,61,38,42,33,7
18,19,20,21,
39,37,5,61,54
FROM FIG. 3C

FIG. 4A

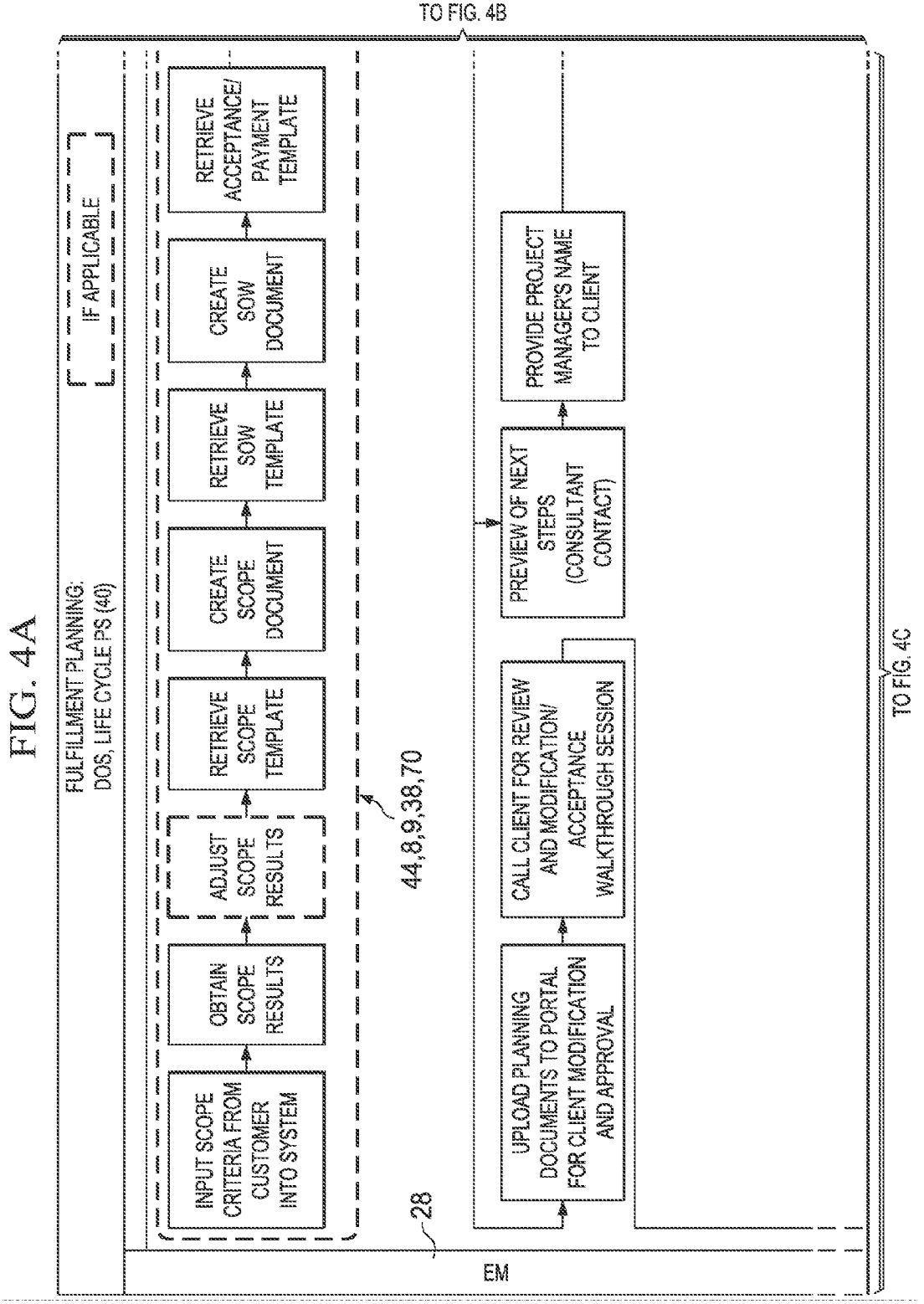

TO FIG. 4B
FULFILLMENT PLANNING:
DOS, LIFE CYCLE PS (40)
IF APPLICABLE
INPUT SCOPE CRITERIA FROM CUSTOMER INTO SYSTEM
OBTAIN SCOPE RESULTS
ADJUST SCOPE RESULTS
RETRIEVE SCOPE TEMPLATE
CREATE SCOPE DOCUMENT
RETRIEVE SOW TEMPLATE
CREATE SOW DOCUMENT
RETRIEVE ACCEPTANCE/ PAYMENT TEMPLATE
44,8,9,38,70
28
EM
UPLOAD PLANNING DOCUMENTS TO PORTAL FOR CLIENT MODIFICATION AND APPROVAL
CALL CLIENT FOR REVIEW AND MODIFICATION/ ACCEPTANCE WALKTHROUGH SESSION
PREVIEW OF NEXT STEPS (CONSULTANT CONTACT)
PROVIDE PROJECT MANAGER'S NAME TO CLIENT
TO FIG. 4C

FIG. 4B

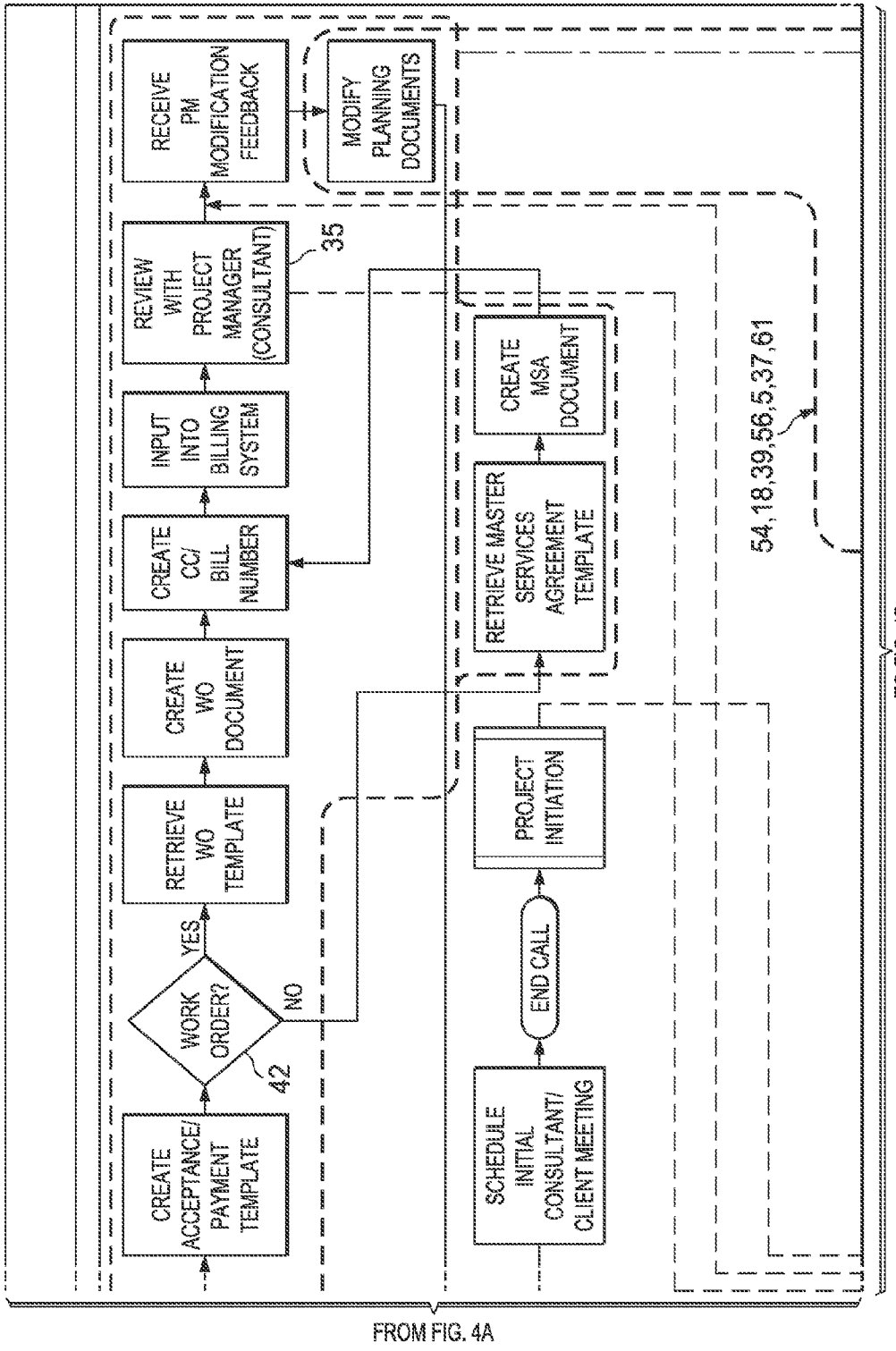

CREATE ACCEPTANCE/ PAYMENT TEMPLATE
WORK ORDER?
42
YES
NO
RETRIEVE WO TEMPLATE
CREATE WO DOCUMENT
CREATE CC/ BILL NUMBER
INPUT INTO BILLING SYSTEM
REVIEW WITH PROJECT MANAGER (CONSULTANT)
35
RECEIVE PM MODIFICATION FEEDBACK
MODIFY PLANNING DOCUMENTS
SCHEDULE INITIAL CONSULTANT/ CLIENT MEETING
END CALL
PROJECT INITIATION
RETRIEVE MASTER SERVICES AGREEMENT TEMPLATE
CREATE MSA DOCUMENT
54,18,39,56,5,37,61
FROM FIG. 4A
TO FIG. 4D

FIG. 4C

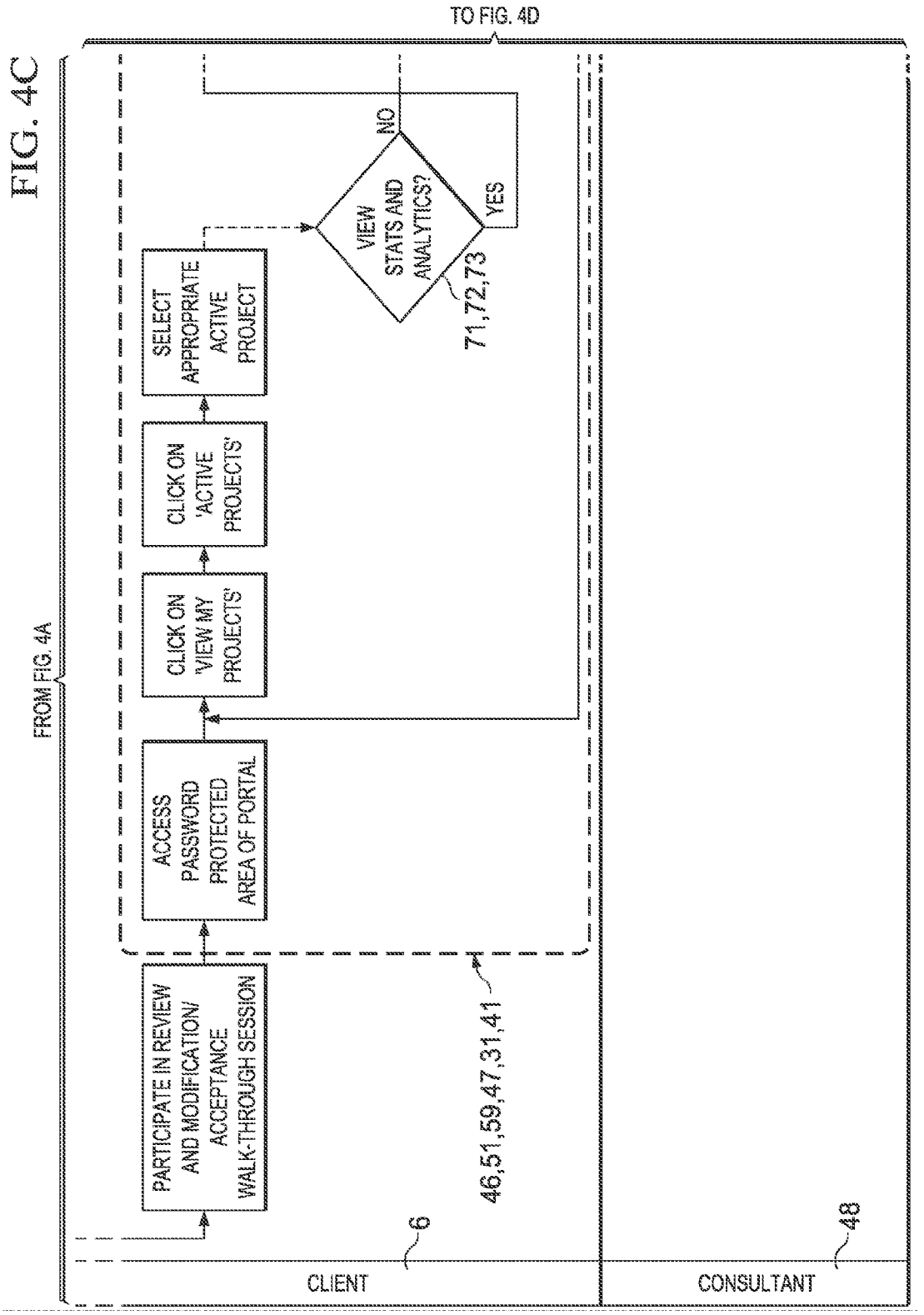

TO FIG. 4D
FROM FIG. 4A
PARTICIPATE IN REVIEW AND MODIFICATION/ ACCEPTANCE WALK-THROUGH SESSION
ACCESS PASSWORD PROTECTED AREA OF PORTAL
CLICK ON 'VIEW MY PROJECTS'
CLICK ON 'ACTIVE PROJECTS'
SELECT APPROPRIATE ACTIVE PROJECT
VIEW STATS AND ANALYTICS?
NO
YES
71,72,73
46,51,59,47,31,41
6
48
CLIENT
CONSULTANT

FIG. 4D

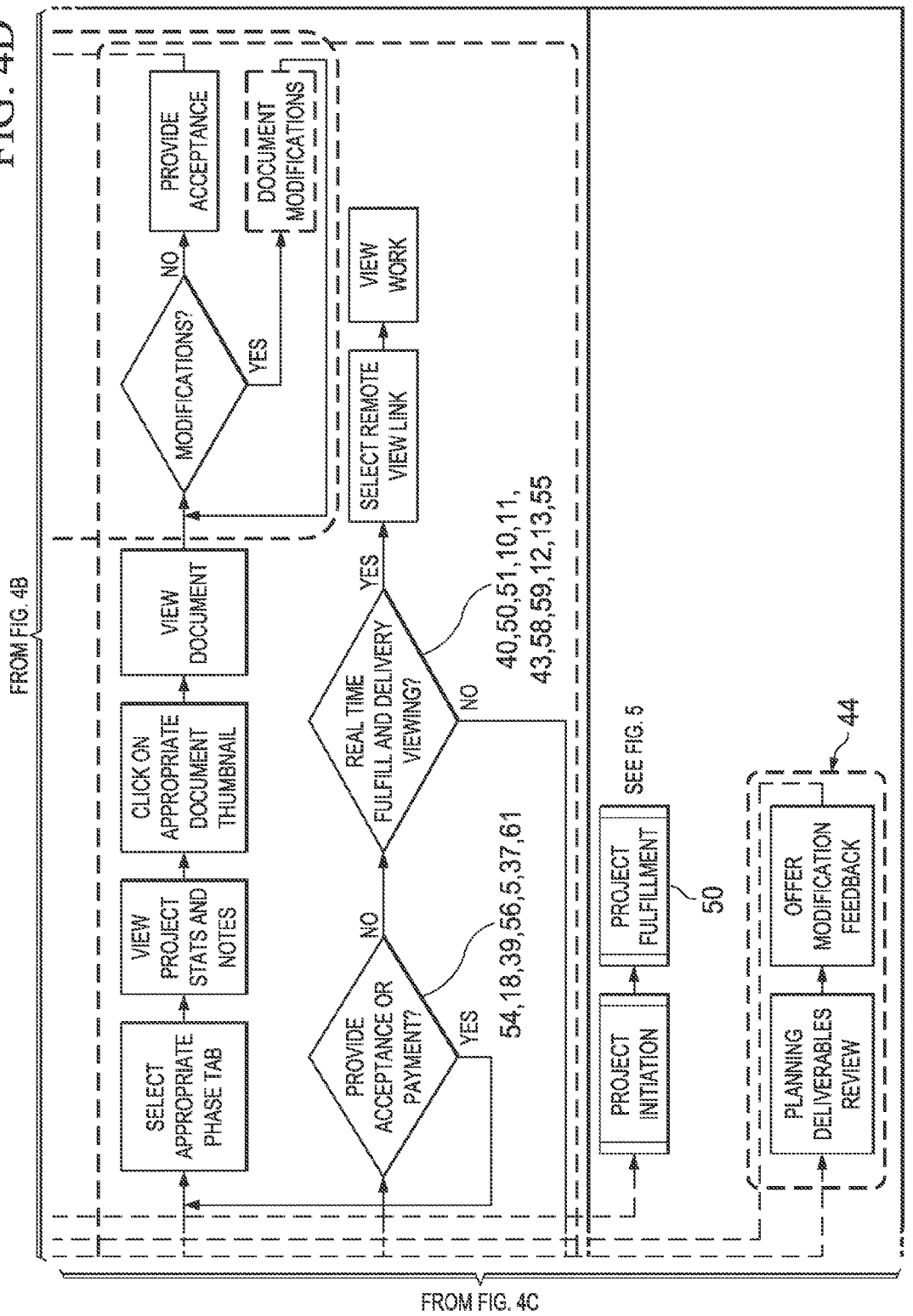

FROM FIG. 4B
SELECT APPROPRIATE PHASE TAB
VIEW PROJECT STATS AND NOTES
CLICK ON APPROPRIATE DOCUMENT THUMBNAIL
VIEW DOCUMENT
MODIFICATIONS?
NO
YES
PROVIDE ACCEPTANCE
DOCUMENT MODIFICATIONS
SELECT REMOTE VIEW LINK
VIEW WORK
REAL TIME FULFILL AND DELIVERY VIEWING?
YES
NO
40,50,51,10,11, 43,58,59,12,13,55
PROVIDE ACCEPTANCE OR PAYMENT?
NO
YES
54,18,39,56,5,37,61
PROJECT INITIATION
PROJECT FULFILLMENT
SEE FIG. 5
50
PLANNING DELIVERABLES REVIEW
OFFER MODIFICATION FEEDBACK
44
FROM FIG. 4C

FIG. 5A

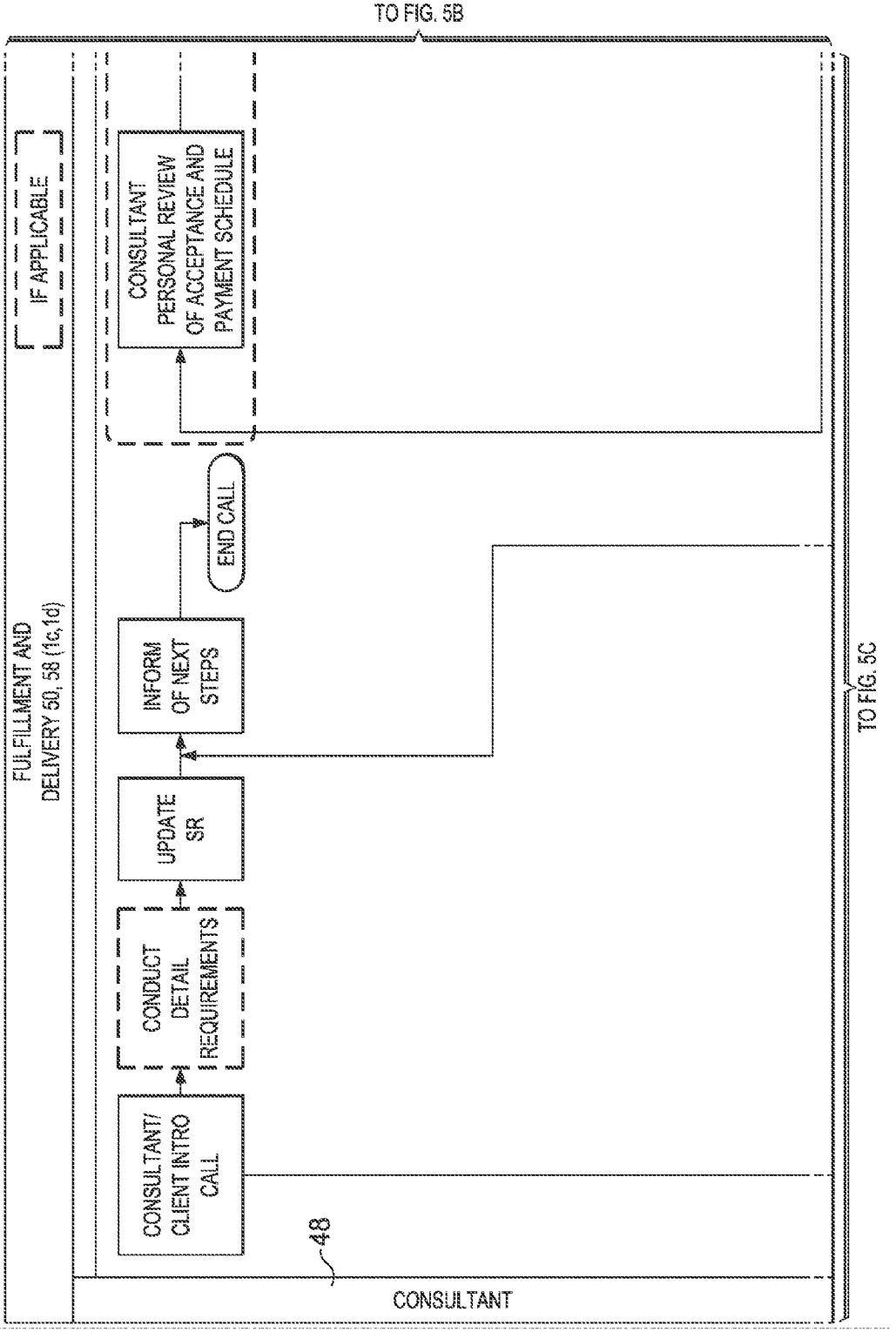

TO FIG. 5B
FULFILLMENT AND DELIVERY 50, 58 (1c,1d)
IF APPLICABLE
CONSULTANT/ CLIENT INTRO CALL
CONDUCT DETAIL REQUIREMENTS
UPDATE SR
INFORM OF NEXT STEPS
END CALL
CONSULTANT PERSONAL REVIEW OF ACCEPTANCE AND PAYMENT SCHEDULE
48
CONSULTANT
TO FIG. 5C

FIG. 5B

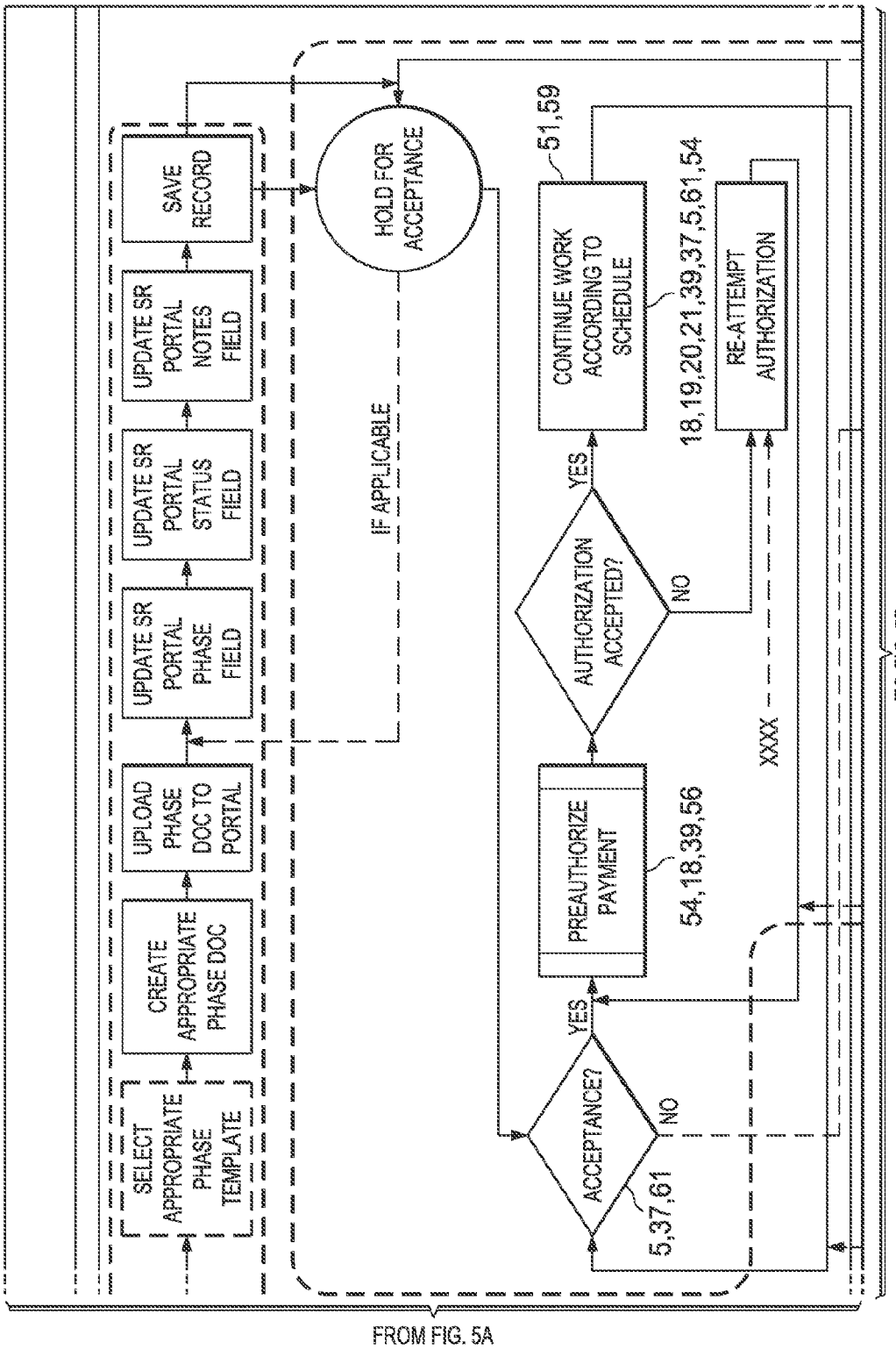

SELECT APPROPRIATE PHASE TEMPLATE
CREATE APPROPRIATE PHASE DOC
UPLOAD PHASE DOC TO PORTAL
UPDATE SR PORTAL PHASE FIELD
UPDATE SR PORTAL STATUS FIELD
UPDATE SR PORTAL NOTES FIELD
SAVE RECORD
HOLD FOR ACCEPTANCE
IF APPLICABLE
ACCEPTANCE?
YES
NO
5,37,61
PREAUTHORIZE PAYMENT
54,18,39,56
AUTHORIZATION ACCEPTED?
YES
NO
CONTINUE WORK ACCORDING TO SCHEDULE
51,59
18,19,20,21,39,37,5,61,54
RE-ATTEMPT AUTHORIZATION
XXXX
FROM FIG. 5A
TO FIG. 5D

FIG. 5C

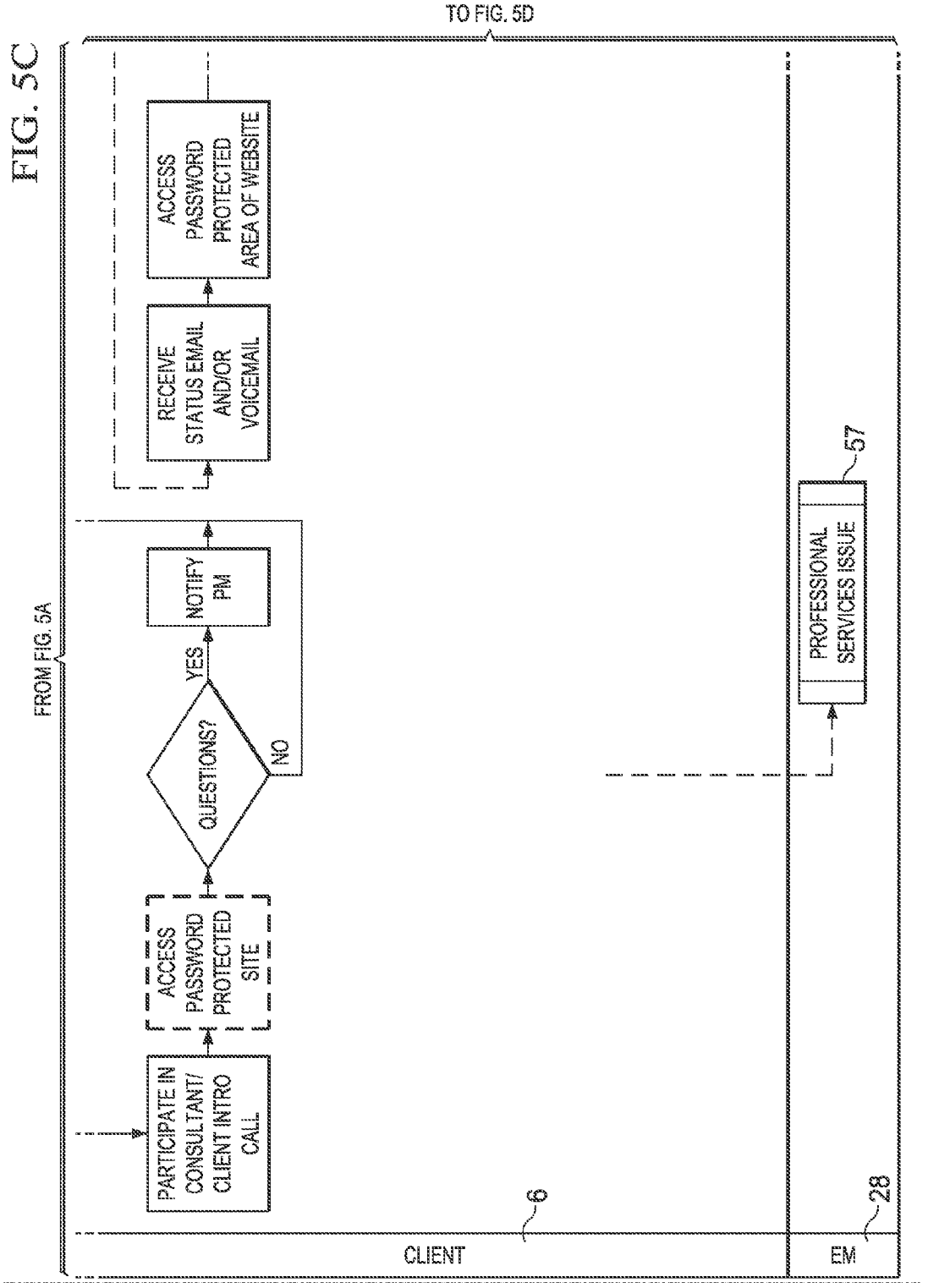

TO FIG. 5D
FROM FIG. 5A
PARTICIPATE IN CONSULTANT/ CLIENT INTRO CALL
ACCESS PASSWORD PROTECTED SITE
QUESTIONS?
YES
NO
NOTIFY PM
RECEIVE STATUS EMAIL AND/OR VOICEMAIL
ACCESS PASSWORD PROTECTED AREA OF WEBSITE
PROFESSIONAL SERVICES ISSUE
57
6
28
CLIENT
EM

FIG. 5D

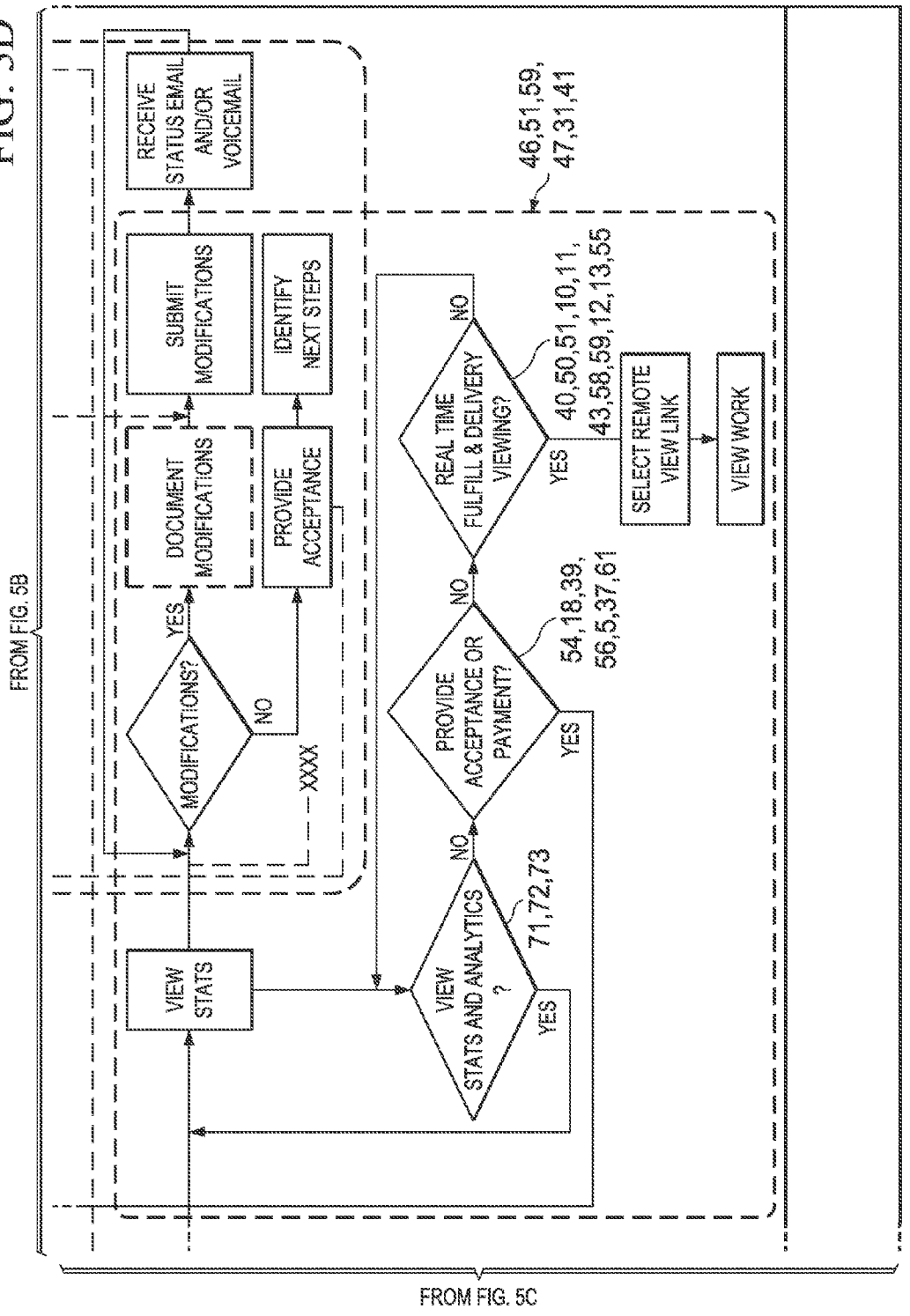

FROM FIG. 5B
VIEW STATS
MODIFICATIONS?
YES
NO
DOCUMENT MODIFICATIONS
PROVIDE ACCEPTANCE
SUBMIT MODIFICATIONS
IDENTIFY NEXT STEPS
RECEIVE STATUS EMAIL AND/OR VOICEMAIL
XXXX
VIEW STATS AND ANALYTICS ?
71,72,73
PROVIDE ACCEPTANCE OR PAYMENT?
54,18,39, 56,5,37,61
REAL TIME FULFILL & DELIVERY VIEWING?
40,50,51,10,11, 43,58,59,12,13,55
46,51,59, 47,31,41
SELECT REMOTE VIEW LINK
VIEW WORK
FROM FIG. 5C

FIG. 6A

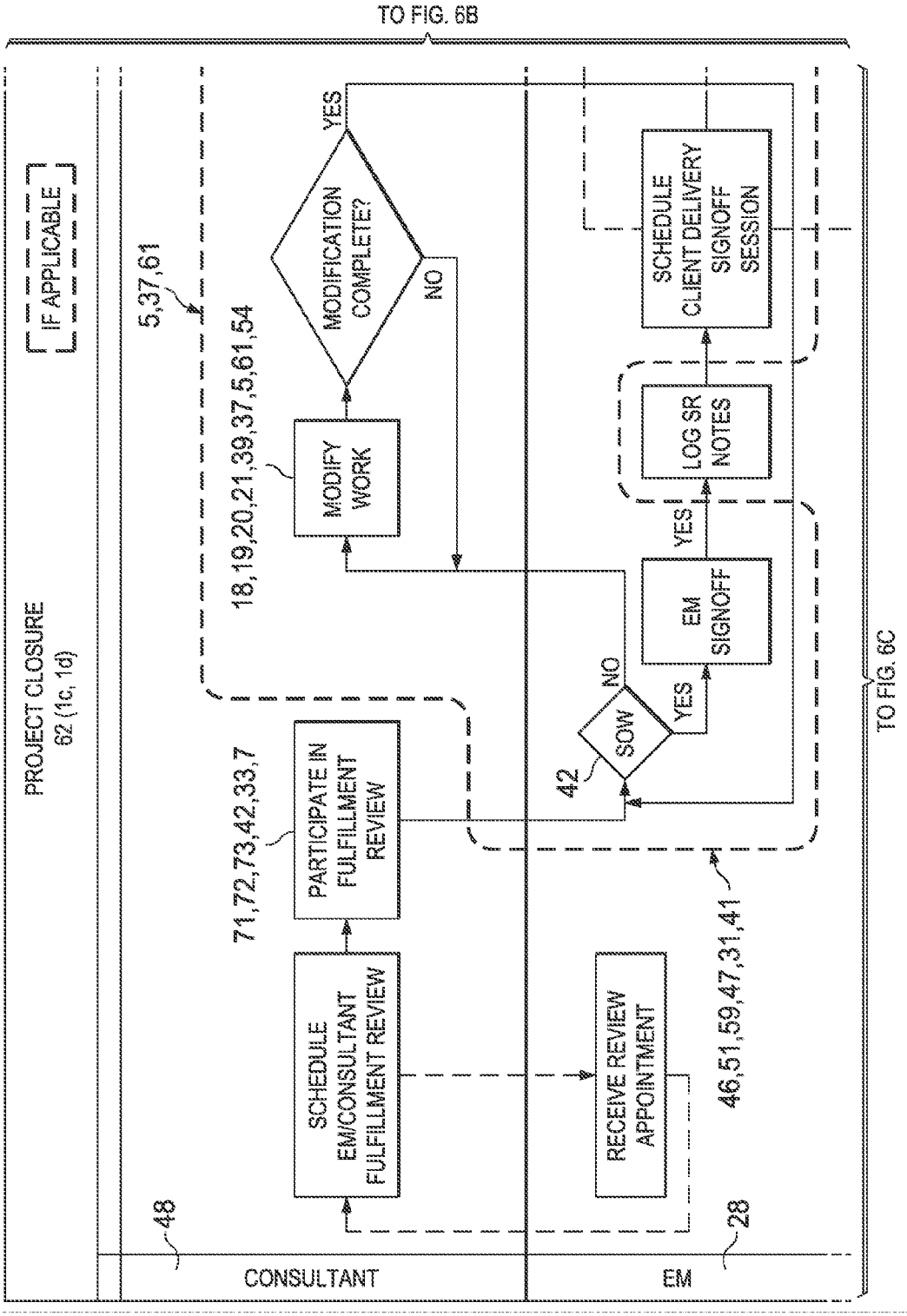

TO FIG. 6B
PROJECT CLOSURE
62 (1c, 1d)
IF APPLICABLE
5,37,61
18,19,20,21,39,37,5,61,54
MODIFY WORK
MODIFICATION COMPLETE?
YES
NO
71,72,73,42,33,7
PARTICIPATE IN FULFILLMENT REVIEW
SCHEDULE EM/CONSULTANT FULFILLMENT REVIEW
42
SOW
NO
YES
EM SIGNOFF
YES
LOG SR NOTES
SCHEDULE CLIENT DELIVERY SIGNOFF SESSION
RECEIVE REVIEW APPOINTMENT
46,51,59,47,31,41
48
28
CONSULTANT
EM
TO FIG. 6C

FIG. 6B

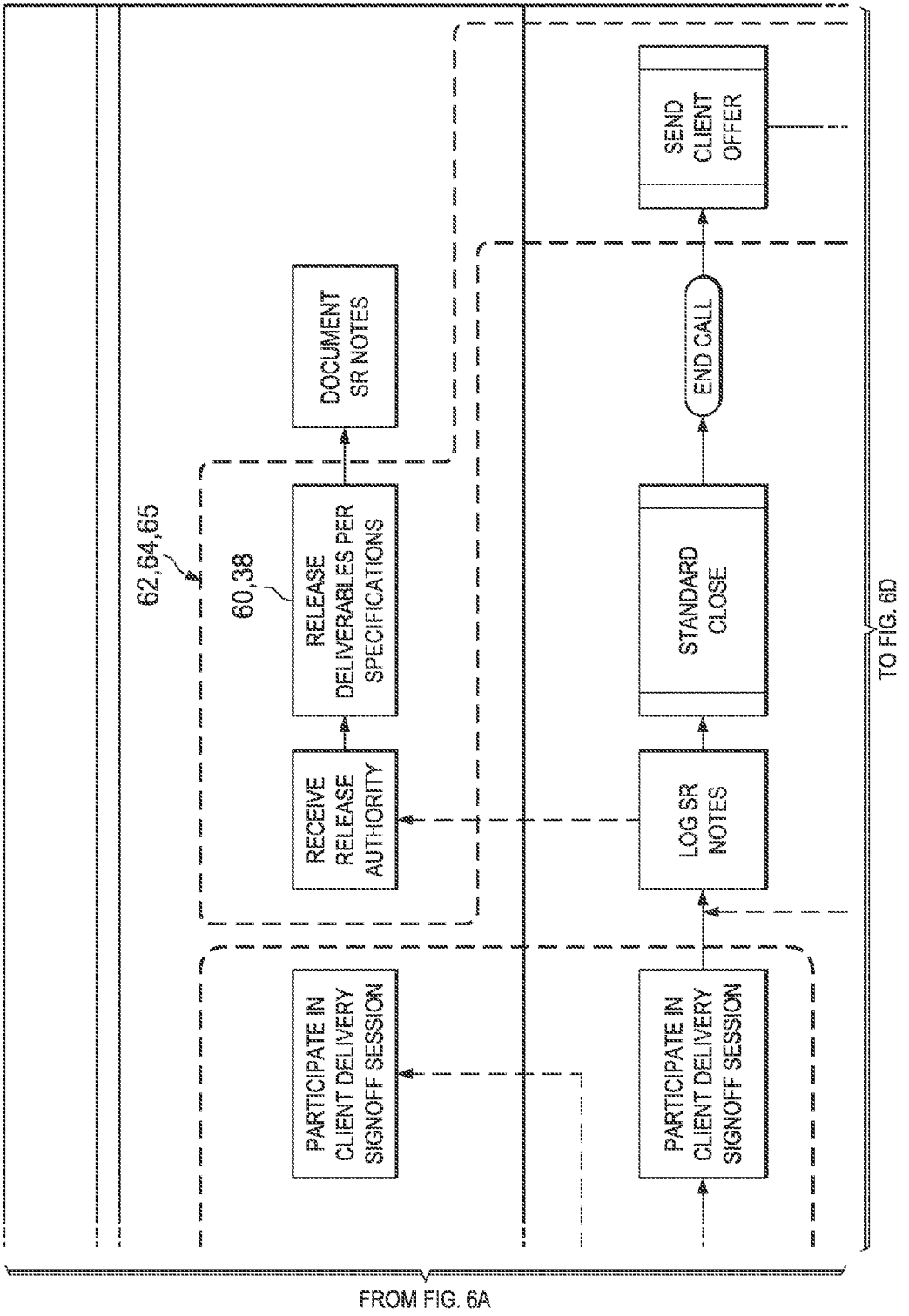

62,64,65
60,38
PARTICIPATE IN CLIENT DELIVERY SIGNOFF SESSION
RECEIVE RELEASE AUTHORITY
RELEASE DELIVERABLES PER SPECIFICATIONS
DOCUMENT SR NOTES
PARTICIPATE IN CLIENT DELIVERY SIGNOFF SESSION
LOG SR NOTES
STANDARD CLOSE
END CALL
SEND CLIENT OFFER
FROM FIG. 6A
TO FIG. 6D

FIG. 6C

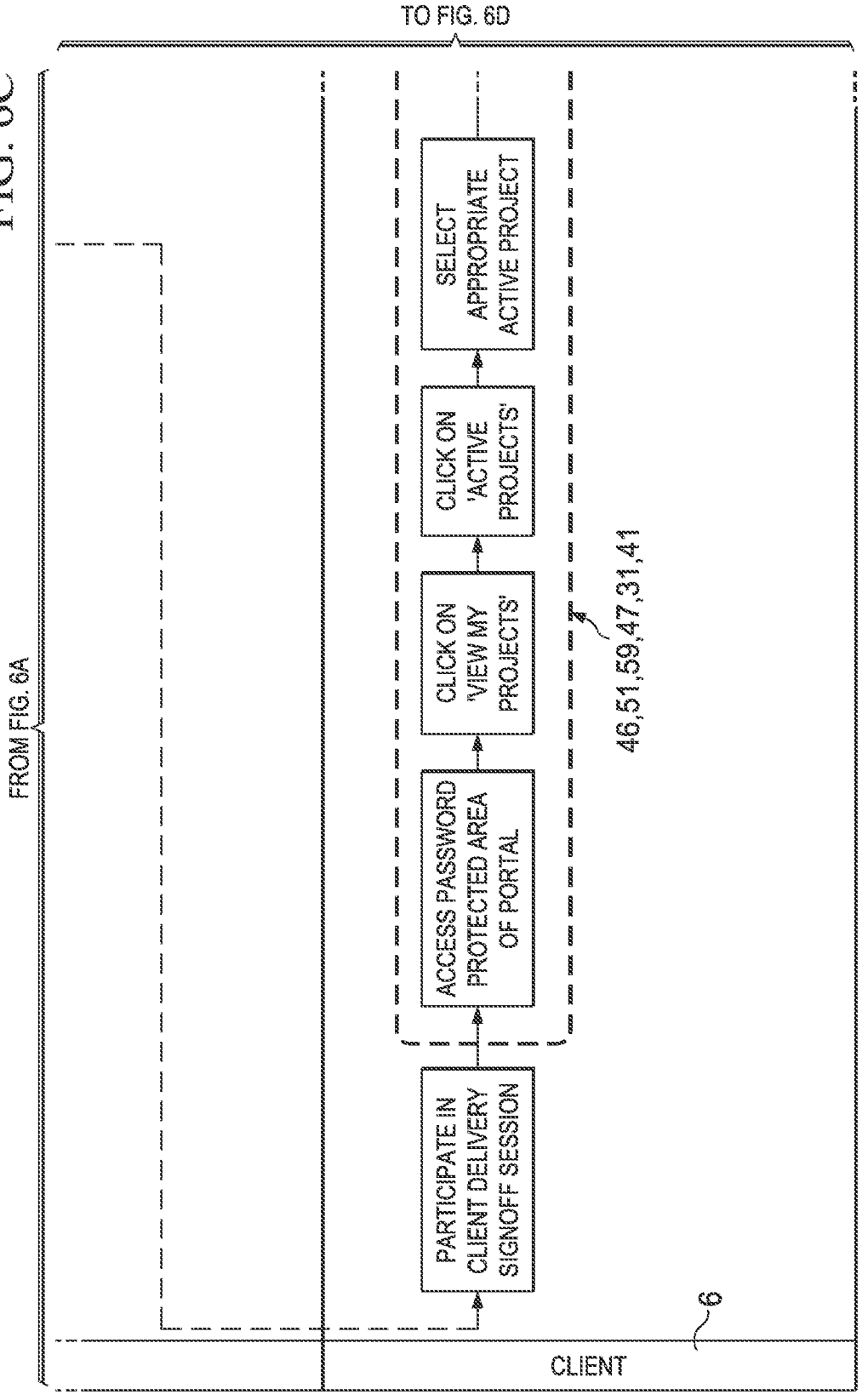

TO FIG. 6D
FROM FIG. 6A
PARTICIPATE IN CLIENT DELIVERY SIGNOFF SESSION
ACCESS PASSWORD PROTECTED AREA OF PORTAL
CLICK ON 'VIEW MY PROJECTS'
CLICK ON 'ACTIVE PROJECTS'
SELECT APPROPRIATE ACTIVE PROJECT
46,51,59,47,31,41
6
CLIENT

FIG. 6D

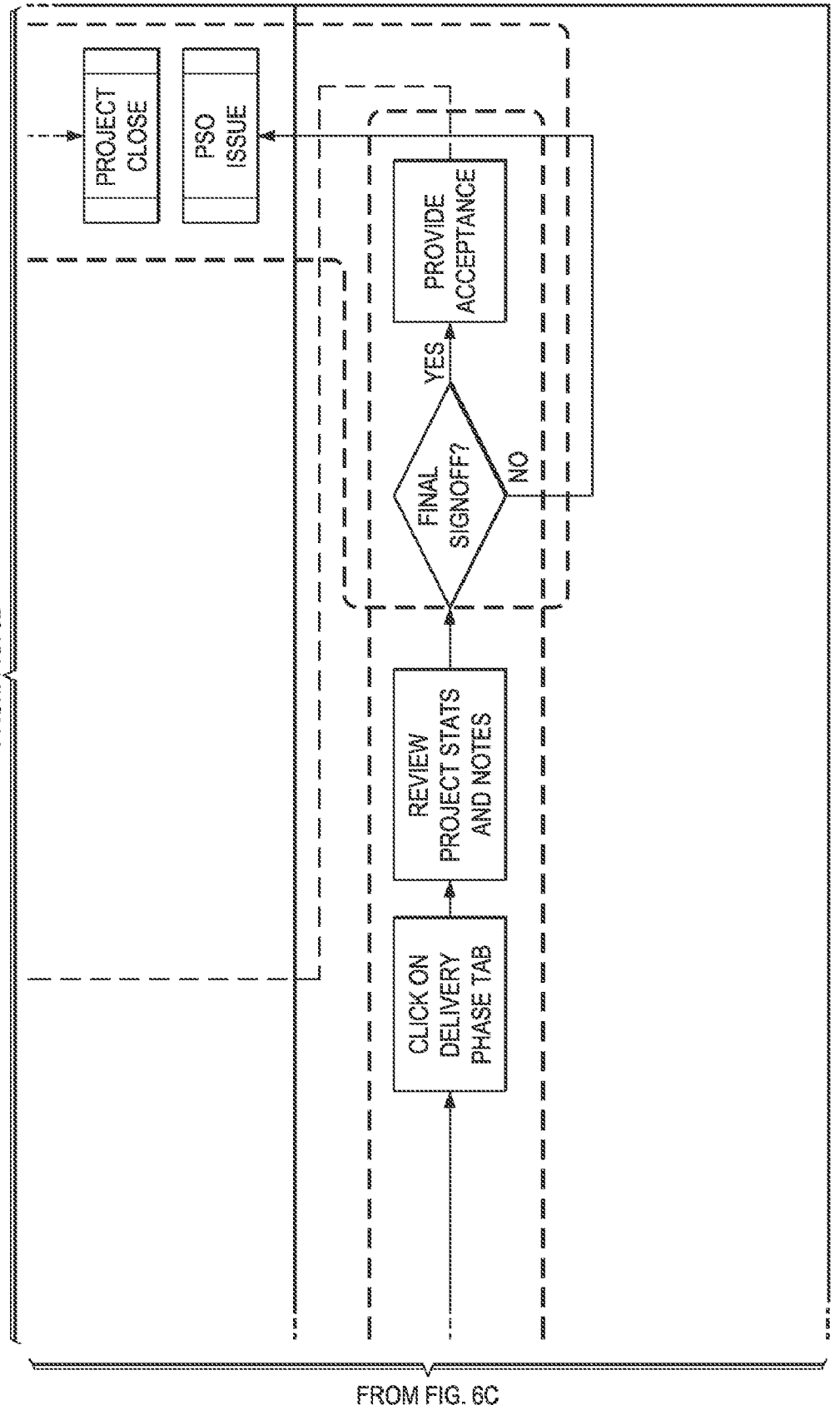
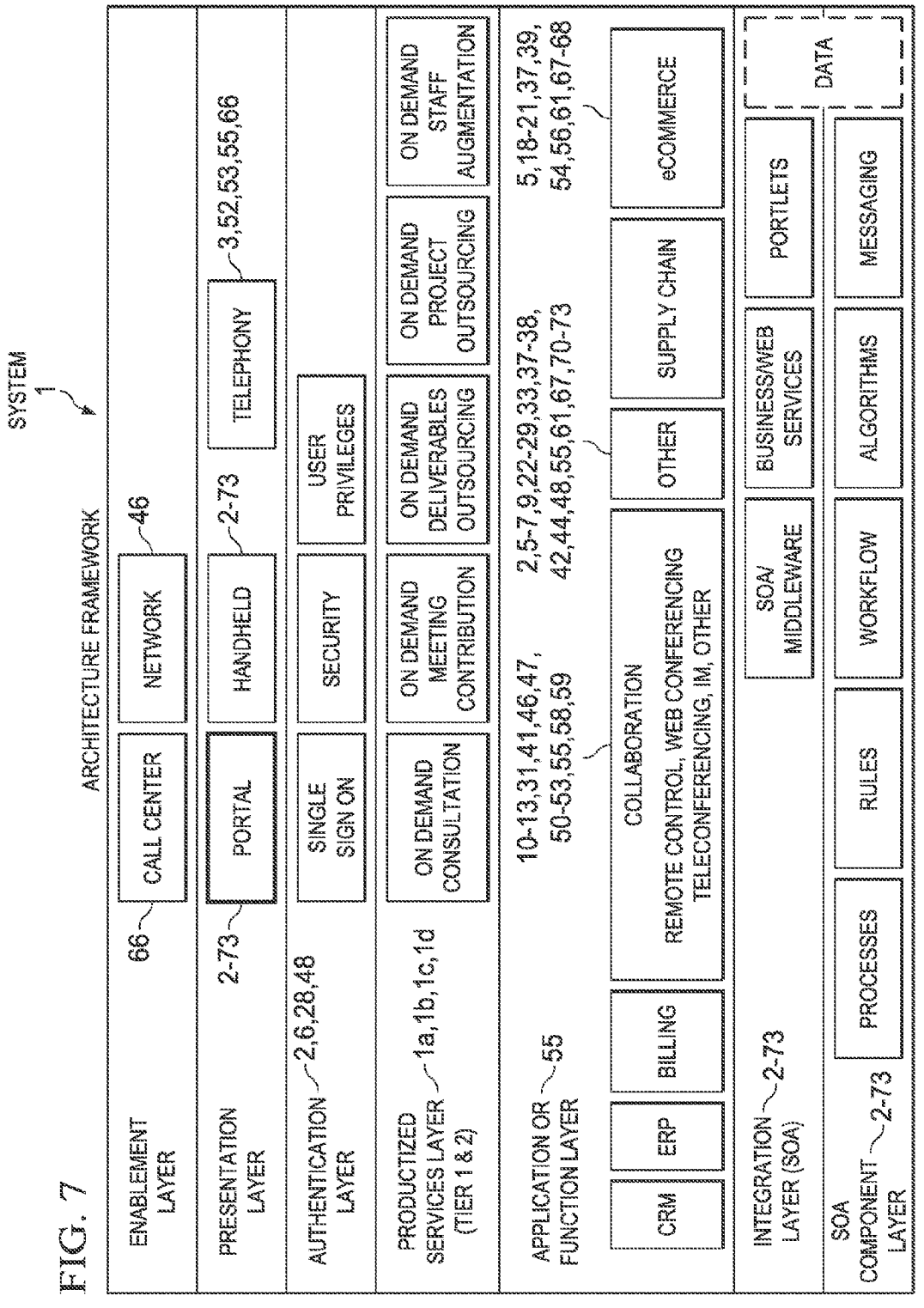

FROM FIG. 6B
PROJECT CLOSE
PSO ISSUE
PROVIDE ACCEPTANCE
YES
FINAL SIGNOFF?
NO
REVIEW PROJECT STATS AND NOTES
CLICK ON DELIVERY PHASE TAB
FROM FIG. 6C

FIG. 7


SYSTEM
1
ARCHITECTURE FRAMEWORK
ENABLEMENT LAYER
66
CALL CENTER
NETWORK
46
PRESENTATION LAYER
2-73
PORTAL
HANDHELD
2-73
TELEPHONY
3,52,53,55,66
AUTHENTICATION LAYER
2,6,28,48
SINGLE SIGN ON
SECURITY
USER PRIVILEGES
PRODUCTIZED SERVICES LAYER (TIER 1 & 2)
1a,1b,1c,1d
ON DEMAND CONSULTATION
ON DEMAND MEETING CONTRIBUTION
ON DEMAND DELIVERABLES OUTSOURCING
ON DEMAND PROJECT OUTSOURCING
ON DEMAND STAFF AUGMENTATION
APPLICATION OR FUNCTION LAYER
55
10-13,31,41,46,47, 50-53,55,58,59
2,5-7,9,22-29,33,37-38, 42,44,48,55,61,67,70-73
5,18-21,37,39, 54,56,61,67-68
CRM
ERP
BILLING
COLLABORATION
REMOTE CONTROL, WEB CONFERENCING TELECONFERENCING, IM, OTHER
OTHER
SUPPLY CHAIN
eCOMMERCE
INTEGRATION LAYER (SOA)
2-73
SOA/ MIDDLEWARE
BUSINESS/WEB SERVICES
PORTLETS
SOA COMPONENT LAYER
2-73
PROCESSES
RULES
WORKFLOW
ALGORITHMS
MESSAGING
DATA

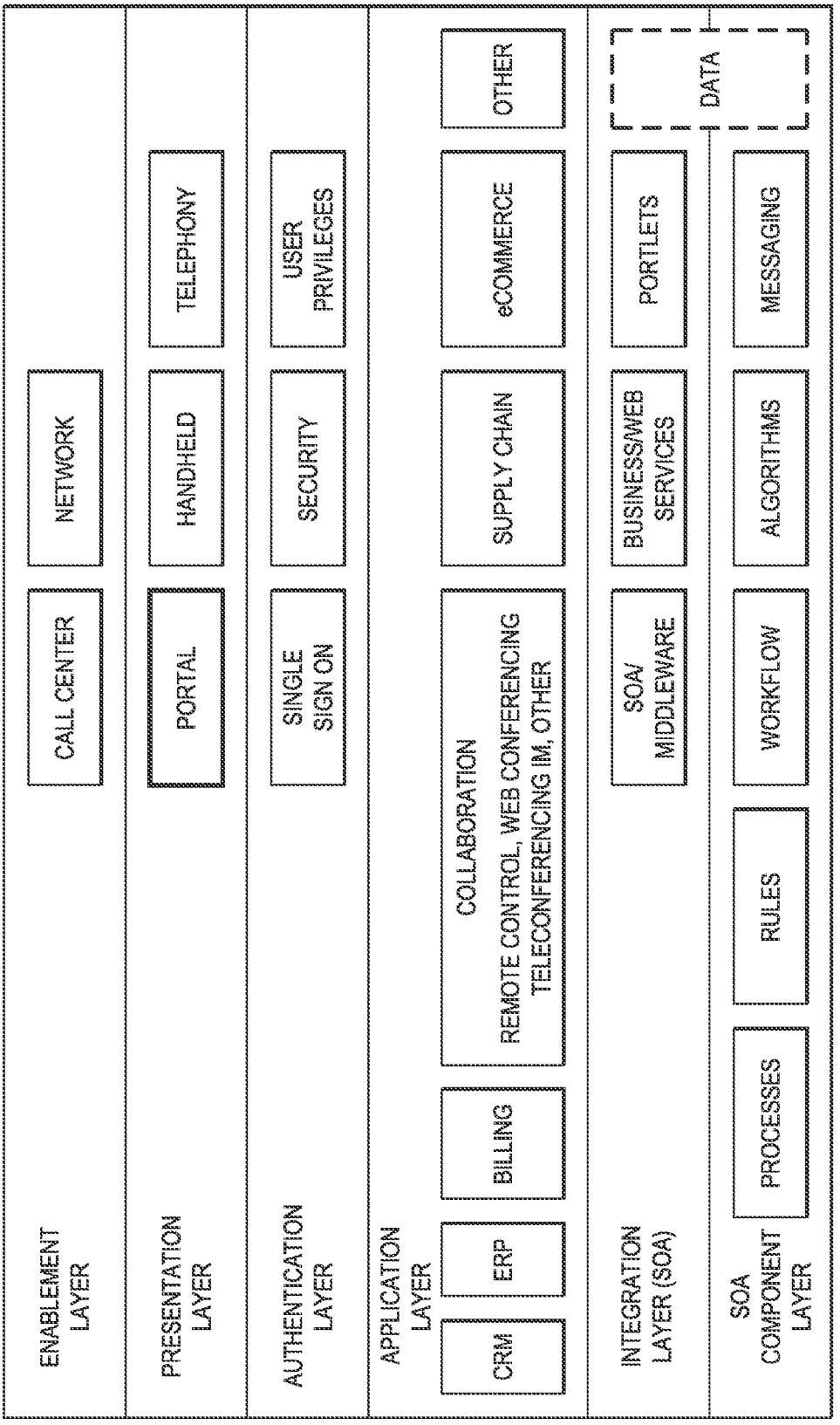

ENABLEMENT LAYER
CALL CENTER
NETWORK
PRESENTATION LAYER
PORTAL
HANDHELD
TELEPHONY
AUTHENTICATION LAYER
SINGLE SIGN ON
SECURITY
USER PRIVILEGES
APPLICATION LAYER
CRM
ERP
BILLING
COLLABORATION
REMOTE CONTROL, WEB CONFERENCING
TELECONFERENCING IM, OTHER
SUPPLY CHAIN
eCOMMERCE
OTHER
INTEGRATION LAYER (SOA)
SOA/ MIDDLEWARE
BUSINESS/WEB SERVICES
PORTLETS
DATA
SOA COMPONENT LAYER
PROCESSES
RULES
WORKFLOW
ALGORITHMS
MESSAGING

DIAGRAM 1

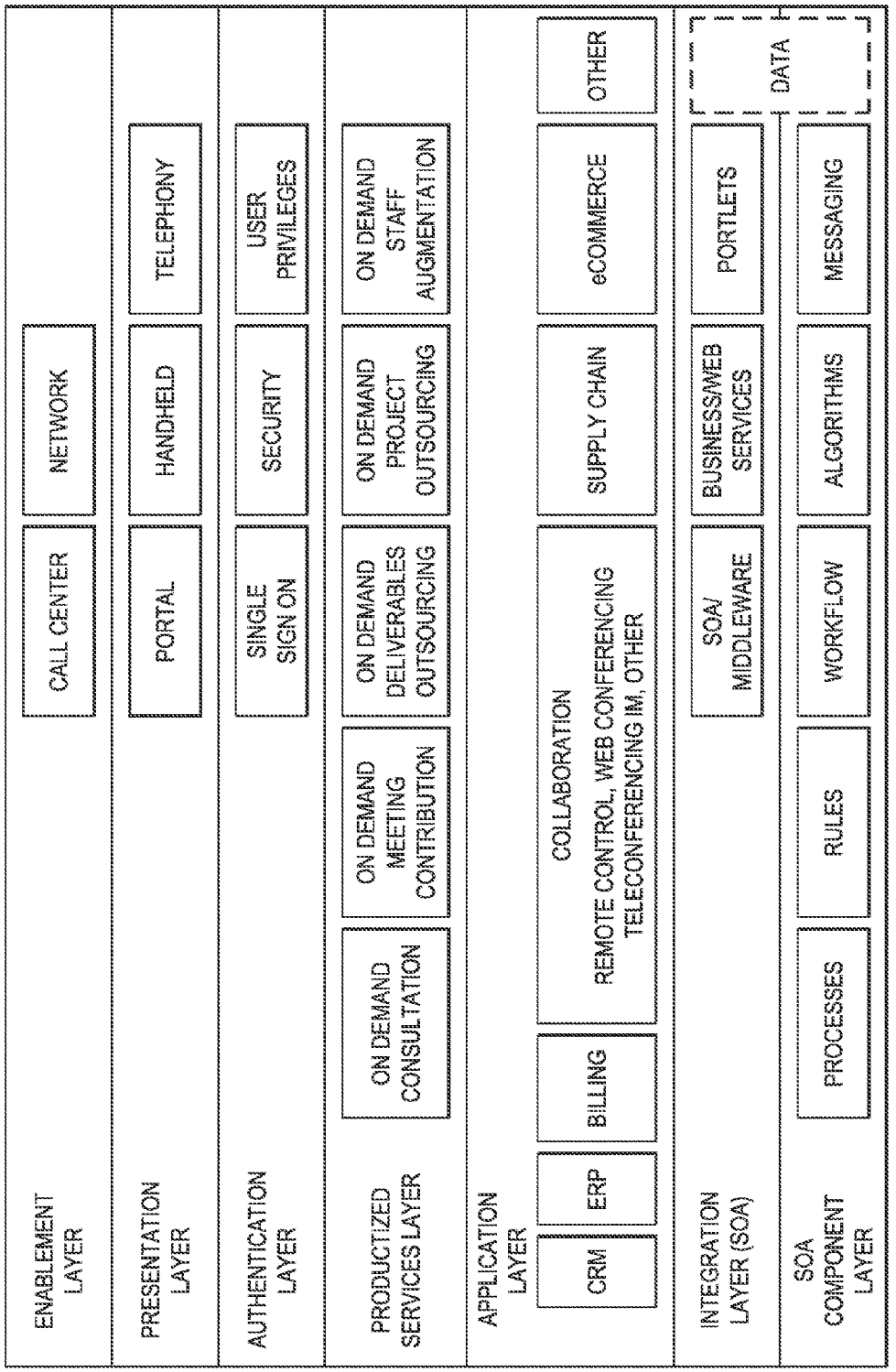

ENABLEMENT LAYER
CALL CENTER
NETWORK
PRESENTATION LAYER
PORTAL
HANDHELD
TELEPHONY
AUTHENTICATION LAYER
SINGLE SIGN ON
SECURITY
USER PRIVILEGES
PRODUCTIZED SERVICES LAYER
ON DEMAND CONSULTATION
ON DEMAND MEETING CONTRIBUTION
ON DEMAND DELIVERABLES OUTSOURCING
ON DEMAND PROJECT OUTSOURCING
ON DEMAND STAFF AUGMENTATION
APPLICATION LAYER
CRM
ERP
BILLING
COLLABORATION
REMOTE CONTROL, WEB CONFERENCING TELECONFERENCING IM, OTHER
SUPPLY CHAIN
eCOMMERCE
OTHER
INTEGRATION LAYER (SOA)
SOA/ MIDDLEWARE
BUSINESS/WEB SERVICES
PORTLETS
SOA COMPONENT LAYER
PROCESSES
RULES
WORKFLOW
ALGORITHMS
MESSAGING
DATA

DIAGRAM 2

SYSTEMS AND METHODS FOR PROFESSIONAL SERVICES PROCUREMENT

CROSS-REFERENCE TO RELATED APPLICATION

[0001] This application is a continuation application of U.S. patent application Ser. No. 11/380,467, filed on Apr. 27, 2006, which is a non-provisional application of provisional application Ser. No. 60/675,587, filed on Apr. 29, 2005, and is incorporated by reference herein.

TECHNICAL FIELD

[0002] The present invention is in the field of professional services specifically related to life cycle development relative to specialized industries. The present invention provides a system and method by which professional services (legal, accounting, engineering, etc), but more specifically Information Technology services may be sold by an organization, provisioned, transacted, fulfilled, delivered and supported in an on demand fashion. By way of this invention, Professional Services Organizations (PSOs) will be able to provide access to company services on an as needed just-in-time basis by offering the ability to:

Sell simple and complex professional services on demand via retail in real time.

Enable clients to procure services (communicate need for services) in real time.

Enable client to purchase simple and complex professional services on demand via retail in real time.

Enable client to transact services (facilitate engagement, collaborate in project scoping process, sign contractual documents and make initial payment for services) in real time.

Enable consultants to provision services (plan for engagement, project or work product, route engagement, project or work product) in real time.

Enable consultants to fulfill (analyze, design, develop, test, train) engagement, project or work products remotely in real time.

Enable clients to collaborate with consultants and track engagement, project or work product progression in real time.

Enable clients to provide quality assurance, acceptance and incremental payments of engagement, project or work product in real time.

Enable consultants to deliver, rollout or place in production engagement, project or work product remotely in real time

Enable clients to receive work products (deliverables) in real time.

Enables consultants to provide ongoing support of engagement, project or work products in real time.

[0003] All processes as related above are performed via a converged call center, telecommunication, Internet and ancillary technologies platform.

BACKGROUND

[0004] The essence of professional services consulting is to assist clients with business and/or technology initiatives. Assistance is often provided in the form of advice, meeting or session leadership and participation and through the completion of work products or deliverables that are deemed necessary during the course of the engagement. A consultant's role is to listen, brainstorm, and help the client think through issues by analyzing problems, offering corrective solutions and completing assigned work.

[0005] Consulting is available today in many flavors. Services may be brokered by large international blue chip firms, mid market organizations, small business entities and independent consultants. While the size of the professional services firm may vary, sales and delivery methods are normally the same. Sales cycles are often very long, firms are dependent on credit receivables, service prices are typically very expensive and delivery is more than likely non standard, unpredictable and premise based.

[0006] Today, business is radically different from what existed only a few years ago. Adapting to rapid change is a constant challenge in every organization, market and industry—even more so in the business and technical professional services consulting world. Although spearheading, organizing and facilitating change for many new economy clients—many professional services consulting companies still operate using out dated sales and delivery methods.

[0007] In order to survive in today's fast paced 'on demand' economy, consulting firms, also known as Professional Services Organizations (PSOs), must transform their businesses from the traditional PSO model to a worldwide services model that delivers strategically streamlined services in a real time, standardized, more cost efficient, and geographically agnostic manner.

[0008] As adoption of on demand software technology (Software as a Service) gains favor within the business and technology community, it simply makes sense for professional services firms to adopt a virtual framework for Just-In-Time (JIT) consulting. To date, a JIT services model within the professional services industry hasn't existed. The advent of this invention; coupled with call center, telecommunications, Internet and many ancillary next generation technologies, solves this need

SUMMARY

[0009] To address the foregoing limitations which exist in the prior art, the present invention provides a system and method by which various service industries may sell, procure, transact, provision, fulfill, deliver and support simple and complex professional services in real time.

[0010] Real time sales and delivery of professional services is accomplished through a previously unused system which enable professional services practitioners to provision, fulfill and deliver professional services remotely and allow clients to minimally communicate need for service, collaborate with consultants, create and sign contract documents, watch as services are being fulfilled, provide project acceptance, pay for services and track project management activities in an automated, systemized and real time fashion.

BRIEF DESCRIPTION OF THE DRAWINGS

[0011] FIG A is a high level depiction of an embodiment of the professional services procurement process. A user (**6**) may procure professional services in two ways: By calling a PSO's call center (**66**) or by visiting the PSO online (**46**). **1**) When procuring services by calling a call center (**66**), the user (**6**) will a) dial a toll free number b) choose a professional services competency and its corresponding service from the IVR/ACD (**55**) tree. c) Speak to CSR (**2**) to inform of services need. **2**) When procuring services online (**46**), the user (**6**) will a) go the portal (**46**) b) Choose a professional services competency and then a corresponding service c) depress a call

button (3) which will connect the user to the PSO's call center (66) via a telephonic method (3,55) d) Speak to CSR (2) to inform of services need.

[0012] FIG B is a high level depiction of an embodiment of the professional services transaction process. A CSR (2) will receive or place a call to the user (6). The CSR (2) will open or create a new service record (14). The user (6) will inform CSR (2) of need. The CSR (2) will gather payment data (67,68,54,18,39) from client (6). The CSR (2) will process payment (54,18,39, 19,20,21) if it is a consulting advice (1*a*) or meeting contribution (1*b*) request. The CSR (2) will populate service ticket (14) with detailed client information.

[0013] FIG C is a high level depiction of an embodiment of the professional services provisioning process. The CSR (2) will identify service type (1*a*,1*b*,1*c*,1*d*) i.e., consulting advice, meeting contribution, deliverable outsourcing support or life cycle professional services and update ticket (14). The ticket (14) and client (6) is auto routed (15,16,17) through the system (1) based on the Consultant 2 Client (C2C) load balancing process (25,26,27,29). C2C (25,26,27,29) encompasses a series of business rules, logistics and routing algorithms to include, but is not limited to, data inputted in the service ticket, consultant availability, consultant work load, consultant skill-sets, time of day, country of origin, language, etc. The ticket (14) and the client (6) is routed (15,16,17) in real time to a Consultant (48) or an Engagement Manager (28). If the client (6) requires consulting advice (1*a*) or meeting contribution (1*b*) (see Fig D for more info). If the client (6) requires deliverable outsourcing support (1*c*) or a service within life cycle professional services (1*d*), the EM (28) and client (6) interview (32) begins which leads to the automated scoping process (44,8,9,38,70). The EM (28) and/or Consultant (48) and client (6) will collaboratively scope (44,8,9,38, 70) the engagement. This is an iterative automated process (44,8,9,38,70) until acceptance (5,37,61) and sign off (38) can occur. The interview (32) and scoping process (44,8,9, 38,70) may be performed simultaneously via telephone (66, 52,53) and/or on the portal (46,51,59). The Statement of Work (38), which includes scope (38) and an incremental acceptance and payment schedule (38), will eventually be accepted (5,37,61) and signed digitally (42,33,7) and/or a signed hard copy (42,33,7) uploaded via the portal (46,47,31,41). The EM (28) and client (6) will likewise collaborate (10,11,12,13,50, 51,52,53,58,59,31, 41,46,47) on the contract process (5,37, 61,38,42,33,7). This is an iterative automated process (5,37, 61,38,42,33,7,10,11,12,13,50,51,52,53,58,59) until final acceptance (5,37,61) and sign off (42,33,7) can occur. The entire scoping (44,8,9,38,70), contract (42,33,7), acceptance (5,37,61) and signoff (42,33,7) process may be performed via telephone (66,52,53) and/or on the portal (46,51,59, 47,31, 41). Contract (42,33,7) will eventually be accepted (5,37,61) and signed digitally (42,33,7) and/or a signed hard copy (42, 33,7) uploaded via the portal (46,47,31,41). Initial payment (54,18,39,56) for deliverable outsourcing (1*c*) or life cycle professional services (1*d*) is processed according to an automated Incremental Acceptance and Payment Schedule (18, 19,20,21,39,37,5,61,54).

[0014] FIG D is a high level depiction of an embodiment of the professional services fulfillment (40,50) and delivery (43, 58) process. The ticket (14) and the client (6) is routed (15, 16,17) in real time to a Consultant (48). If the client (6) requires consulting advice (1*a*), the consultant (48) provides advice (1*a*) via telephone (66,52,53) in real time. If the client (6) requires the consultant (48) to facilitate or participate in a meeting (1*b*) or a session (1*b*) of some type, the consultant (48) participates in a meeting contribution (1*b*) by arranging and scheduling an appointment (22,23,24,25,26,27,29) to participate in the meeting (1*b*) or session (1*b*) according to the Statement of Work (38). Meeting contributions (1*b*) may be one time or recurring, they may be fulfilled (40,50,51,10,11) on demand or at future date and time. Likewise, meeting contributions (1*b*) may be fulfilled (40,50,51,10,11) and delivered (43,58,59,12,13) via telephone conferencing (55) or by webinar (55) depending on the Statement of Work (38). If the client (6) requires deliverable outsourcing support (1*c*) or a service within life cycle professional services (1*d*), the consultant (48) will receive the ticket after the EM (28) concludes the interviewing (32), scoping (44,8,9,38,70), and contract (42,33,7) process. The consultant (48) may begin fulfilling (40,50,51,10,11) the engagement according to the Statement of Work (38). Fulfillment (40,50,51,10,11) and delivery (43,58,59,12,13) of deliverable outsourcing support and life cycle professional services may be fulfilled (40,50, 51,10,11) and delivered (43,58,59,12,13) in real time via remote control technologies (55), web based collaboration and conferencing (webinars) (55), email (55), telephonic conferencing (55) and by any other means by which we may deem appropriate to facilitate real time fulfillment (40,50,51, 10,11) and delivery (43,58,59,12,13) in the future. The client (6) is able to collaborate (10,11,12,13,50,51,52,53,58,59,31, 41,46,47) with the consultant (28), as needed, via telephone (66,52,53) and/or via the portal (46,51,59). The client (6) may provide acceptance (5,37,61), feedback (5,37,61), modification requests (5,37,61) and payment (54,18,39,56) of work as work is modularly completed (18,19,20,21,39,37,5,61,54) via the portal (46,47,31,41). The client (6) may view outsourced work (1*c*,1*d*, 51,59) in real time, via the portal (46), as it is progressively fulfilled (18,19,20,21,39,37,5,61,54). Clients (6) may track project progress (1*c*,1*d*, 51,59,18,19, 20,21,39,37,5,61,54), view project (1*a*,1*b*,1*c*,1*d*, 38,) history and notes, chat (55) with consultants (48), view project status (1*c*,1*d*, 38), view project analytics (1*a*,1*b*,1*c*,1*d*, 38, 2,6,28, 48) and more in real time.

[0015] FIG. 1 is a high level depiction of an embodiment of the professional services system (1). As shown in FIG. 1, a user (6) may access the system (1) and its productized services and associated methods and processes (1*a*, 1*b*, 1*c*, 1*d*) via contacting a PSO's call center (66) or by accessing the PSO's portal (46). Customer service representatives (2), engagement managers (28), consultant managers (28), project managers (48) and other consultants (48) have direct access to the system (1)(1*a*, 1*b*, 1*c*, 1*d*). The system includes an embodiment of components (14,19,24,27,32,34,38,40,42, 43,44,45,46,47,49,50,51,52,53,54,55,56,57,58,5 9,60,61,62, 70, 71) and supporting triggers, routing processes, business rules and algorithms (3,4,5,7,8,9,10,11,12,13,15,16,17,18,20,21,22,23,25,26,29, 30,31,33,35,36,37, 39,41,63,64,65,72,73).

[0016] FIG. 2 is a depiction of an embodiment of the consulting advice (1*a*) or meeting contribution (1*b*) services method. As shown in FIG. 2, a user (6) may access the system (1) to receive real time consulting advice (1*a*) and/or meeting contribution (1*b*) services. The client (6) may access the system (1) via the call center (66) or via the portal (46) (see FIG. 1, FIG A for more details). The client (6) will begin speaking with a CSR (2) after gaining access via communication gateway (3), telephony (55), call center (66) and ancillary COTS (55). The CSR (2) will greet client (6), begin

interview (67) and account or on demand discovery (68) processes. The CSR (2) will create or open existing service record (14, 55) if the system (1) and its supporting COTS-CTI (55) fails to make the record (14) available in an automated manner (3,4,15,16,17 55). The CSR (2) will determine whether the client (6) is a prepaid customer (account) or a cash customer (18,19,20,21,39,54,33,37,67,68). The CSR (2) will validate consultant (48) availability (25,26,27,29) if a specific consultant (48) is requested. If the consultant (48) is unavailable, the CSR (2) will set an appointment (22,23,24, 25,26,27,29) for follow-up. If the client (6) chooses to override appointment (22,23,24,25,26,27,29) and prefers to speak to next available consultant (48), the system (1) will utilize its automated routing (15,16,17) to locate next available consultant (48). The service record (14) and the client (6) will be routed (15,16,17) to a consultant (48). The consultant (48) will fulfill (40,50,52,10,11) and deliver (43,58,53,12,13) consulting advice (1*a*) in real time via a telephonic fulfillment (52) and delivery (53) method. The consultant (48) will fulfill (40,50,51,10,11) and deliver (43,58,59,12,13) meeting contribution (1*b*) services on demand or at a future date and time via telephonic conferencing (55) and/or via web based collaboration and conferencing (55). If there is a problem (57, 36,39) or issue (57,36,39) that need resolving, the client (6) and/or ticket (14) will be routed to an Engagement Manager (28) or Consulting Manager (28) to resolve.

[0017] FIG. **3** is a depiction of an embodiment of the deliverable outsourcing support (1*c*) or life cycle professional services (1*d*) method. As shown in FIG. **3**, a user (6) may access the system (1) to receive deliverable outsourcing support (1*c*) and/or life cycle professional services (1*d*). The client (6) may access the system (1) via the call center (66) or via the portal (46) (see FIG. **1**, FIG A for more details). The client (6) will begin speaking with a CSR (2) after gaining access via communication gateway (3), telephony, call center and ancillary COTS (55). The CSR (2) will greet client (6), begin interview (67) and account or on demand discovery (68) processes. The CSR (2) will create or open existing service record (14, 55) if the system (1) and its supporting COTS-CTI (55) fails to make the record (14) available in an automated manner. The CSR (2) will determine whether the client (6) is a prepaid customer (account) or a cash customer (18,19,20,21,39,54,33,37,67,68). The CSR (2) will validate engagement manager (28) availability (25,26,27,29). If an EM (28) is unavailable, the CSR (2) will set an appointment (22,23,24,25,26,27,29) for follow-up. If appointment (22,23, 24,25,26,27,29) is not needed, the system (1) will auto route (15,16,17) to locate next available EM (28). The ticket (14) and the client (6) is received in real time by an EM (28). The EM (28) and client (6) interview (32) begins which leads to the automated scoping process (44,8,9,38,70). The EM (28) and/or Consultant (48) and client (6) will collaboratively scope (44,8,9,38,70) the engagement. This is an iterative automated process (44,8,9,38,70) until acceptance (5,37,61) and sign off (38) can occur. The interview (32) and scoping process (44,8,9,38,70) may be performed simultaneously via telephone (66,52,53) and/or on the portal (46,51,59). The Statement of Work (38), which includes scope (38) and an incremental acceptance and payment schedule (38), will eventually be accepted (5,37,61) and signed digitally (42,33, 7) and/or a signed hard copy (42,33,7) uploaded via the portal (46,47,31,41). The EM (28) and client (6) will likewise collaborate (10,11,12,13,50,51,52,53,58,59,31, 41,46,47) on the contract process (5,37,61,38,42,33,7). This is an iterative automated process (5,37,61,38,42,33,7,10,11,12,13,50,51,52,53,58,59) until final acceptance (5,37,61) and sign off (42,33,7) can occur. The entire scoping (44,8,9,38,70), contract (42,33,7), acceptance (5,37,61) and signoff (42,33,7) process may be performed via telephone (66,52,53) and/or on the portal (46,51, 59, 47,31,41). Contract (42,33,7) will eventually be accepted (5,37,61) and signed digitally (42,33,7) and/or a signed hard copy (42,33,7) uploaded via the portal (46,47,31,41). Initial payment (54,18,39,56) for deliverable outsourcing (1*c*) or life cycle professional services (1*d*) is processed according to an automated Incremental Acceptance and Payment Schedule (18,19,20,21,39,37,5,61,54).

[0018] FIG. **4** is a depiction of an embodiment of a more detailed view of the fulfillment planning process (40) pertaining to deliverable outsourcing support (1*c*) or the life cycle professional services (1*d*) method. As shown in FIG. **4**, an EM (28) will begin the fulfillment planning process (40) by scoping the engagement. The EM (28) will input client interview (32) data into the system (1). The data will be inputted into a scoping engine (70), contained within the system (1) which will, according to the interview data (32) inputted, dynamically return scoping results (44,8,9,38,70) based upon interview (32) responses. Scoping results (44,8,9,38,70) may minimally include at least man hours, level of effort, size of engagement, delivery duration, human and technical resources needed, deliverables required, ancillary fees, project assumptions, potential risks and cost of engagement. The scoping engine (44,8,9,38,70) will minimally output auto-generated pre-populated project, cost and contract materials (38). The EM (28) will modify forms (38) as needed. To facilitate collaboration (10,11,12,13,50,51,52,53,58,59,31, 41,46,47) with the client (6) to receive scoping acceptance (5,37,61), the EM will upload scoping (44,8,9,38,70) forms (38) to the portal (46,51,59, 47,31,41). The EM (28) client (6) and/or consultant (48) will modify (5,37,61) forms (38) as needed until acceptance (5,37,61) occurs. Once the client (6) provides acceptance (5,37,61), signs (42,33,7) all pertinent paperwork (38) and pays initial fees (54,18,39,56), the client will gain immediate access to additional portal (46,51,59, 47,31,41) functionality to include project management tracking (71,72,73) which minimally includes project management stats, notes, history, analytics, and reports. The portal (46,51,59, 47,31,41) also enables the client (6) to collaborate with EMs (28) and consultants (48) via chat or web based conference collaboration (55) capabilities, view outsourced work products and/or paper deliverables in real time as they are being remotely (55) fulfilled (40,50,51,10,11) and delivered (43,58,59,12,13). See FIG. **5** for more information.

[0019] FIG. **5** is a depiction of an embodiment of a more detailed view of the fulfillment and delivery process (50) pertaining to deliverable outsourcing support (1*c*) or the life cycle professional services (1*d*) method. As shown in FIG. **5**, as the consultant (48) fulfills outsourced work, the system (1) enables the consultant (48) to minimally upload (46,51,59, 47,31,41) paper documents, notes, and service record (14) details to the portal (46,51,59, 47,31,41). This is an iterative and incremental process (46,51,59, 47,31,41). The consultant (48) will continue this process according to the Incremental Acceptance and Payment Schedule (18,19,20,21,39,37,5,61, 54) until full payment (54,18,39,56), acceptance (5,37,61) and fulfillment activities (40,50,51,10,11) conclude. The client (6) can also use portal (46,51,59, 47,31,41) functionality to perform project management tracking (71,72,73) activities

which minimally include viewing project management stats, notes, history, analytics, and reports. The client is also able to chat and or collaborate with consultants (**48**) via web based collaboration and conferencing (**55**) capabilities. Likewise, the portal (**46**,**51**,**59**, **47**,**31**,**41**) enables the consultant (**48**) to fulfill (**40**,**50**,**51**,**10**,**11**) and deliver (**43**,**58**,**59**,**12**,**13**) outsourced work products and paper deliverables remotely (**55**) and enables the client (**6**) to view outsourced work products and/or paper deliverables in real time as they are being remotely (**55**) fulfilled (**40**,**50**,**51**,**10**,**11**) and delivered (**43**,**58**, **59**,**12**,**13**). Ongoing support of projects will be fulfilled (**40**, **50**,**51**,**10**,**11**) and delivered (**43**,**58**,**59**,**12**,**13**) in the same manner.

[0020] FIG. **6** is a depiction of an embodiment of the project closure process (**62**,**64**,**65**) pertaining to deliverable outsourcing support (**1***c*) or life cycle professional services (**1***d*). As shown in FIG. **6**, the project closure process (**62**,**64**,**65**) consists of the engagement manager (**28**) and the consultant (**28**) participating in an acceptance (**5**,**37**,**61**), and signoff (**5**,**37**, **61**) loop where the EM (**28**) and the consultant (**48**) work in an iterative manner to ensure that all tasks (**71**,**72**,**73**,**42**,**33**,**7**) and milestones (**71**,**72**,**73**,**42**,**33**,**7**) have been met. The culmination includes satisfying all conditions of the contract (**42**, **33**,**7**) and handing over final materials (**60**,**38**). Final signoff (**5**,**37**,**61**) includes the client (**6**), the consultant (**48**) and the engagement manager (**28**) working collaboratively via the telephone (**52**) and the portal (**46**,**51**,**59**, **47**,**31**,**41**).

DETAILED DESCRIPTION

[0021] In an embodiment of the present invention, professional services are sold, procured, transacted, provisioned, fulfilled, delivered and supported, in real time, using a novel business method. A model for on demand sales and service delivery capabilities is outlined as follows:

[0022] A user (**6**) may procure professional services in two ways: By calling a call center (**66**) or by visiting online (**46**).

[0023] 1) When procuring services by calling a call center (**66**), the user (**6**) will a) dial a toll free number b) choose a professional services competency and its corresponding service from the IVR/ACD (**55**) tree. c) The client (**6**) will then speak to a CSR (**2**) to inform of services need.

[0024] 2) When procuring services online (**46**), the user (**6**) will a) go the portal (**46**) b) choose a professional services competency and then a corresponding service c) depress a call button (**3**), which will enable the user to fill out a web based form before telephonically (**3**,**55**) connecting the user to the call center (**66**) d) The client (**6**) will then speak to the CSR (**2**) to inform of services need.

[0025] If the client (**6**) requires consulting advice (**1***a*) or meeting contribution (**1***b*), the CSR (**2**) will greet client (**6**), begin interview (**67**) and account discovery (**68**) process. The CSR (**2**) will create or open existing service record (**14**, **55**) if the system (**1**) and its supporting COTS-CTI (**55**) fails to make the record (**14**) available in an automated manner (**3**,**4**, **15**,**16**,**17 55**). The CSR (**2**) will determine whether the client (**6**) is a prepaid customer (account) or a cash customer (**18**, **19**,**20**,**21**,**39**,**54**,**33**,**37**,**67**,**68**), authorize credit card or other payment method (**54**,**18**,**39**,**56**) and receive deposited payment (**56**). The CSR (**2**) will validate consultant (**48**) availability (**25**,**26**,**27**,**29**) if a specific consultant (**48**) is requested. If the consultant (**48**) is unavailable, the CSR (**2**) will set an appointment (**22**,**23**,**24**,**25**,**26**,**27**,**29**) for follow-up. If the client (**6**) chooses to override appointment (**22**,**23**,**24**,**25**,**26**,**27**, **29**) and prefers to speak to next available consultant (**48**), the ticket (**14**) and client (**6**) is auto routed (**15**,**16**,**17**) through the system (**1**) based on the Consultant 2 Client (C2C) load balancing process (**25**,**26**,**27**,**29**). C2C (**25**,**26**,**27**,**29**) encompasses a series of business rules, logistics and routing algorithms to minimally include service ticket (**14**) data, consultant availability, consultant work load, consultant skill-sets, time of day, country of origin, language, etc. The service record (**14**) and the client (**6**) will be routed (**15**,**16**,**17**) to a consultant (**48**). The consultant (**48**) will fulfill (**40**,**50**,**52**,**10**, **11**) and deliver (**43**,**58**,**53**,**12**,**13**) consulting advice (**1***a*) in real time via a telephonic fulfillment (**52**) and delivery (**53**) method. The consultant (**48**) will fulfill (**40**,**50**,**51**,**10**,**11**) and deliver (**43**,**58**,**59**,**12**,**13**) meeting contribution (**1***b*) services on demand or at a future date and time via telephonic conferencing (**55**) and/or via web based collaboration and conferencing (**55**). If there is a problem (**57**,**36**,**39**) or issue (**57**,**36**, **39**) that need resolving, the client (**6**) and/or ticket (**14**) will be routed to an Engagement Manager (**28**) or Consulting Manager (**28**) to resolve.

[0026] If the client (**6**) requires deliverable outsourcing support (**1***c*) or life cycle professional services (**1***d*), the CSR (**2**) will greet client (**6**), begin interview (**67**) and account discovery (**68**) process. The CSR (**2**) will create or open an existing service record (**14**, **55**) if the system (**1**) and its supporting COTS-CTI (**55**) fails to make the record (**14**) available in an automated manner. The CSR (**2**) will determine whether the client (**6**) is a prepaid customer (account) or a cash customer (**18**,**19**,**20**,**21**,**39**,**54**,**33**,**37**,**67**,**68**). The CSR (**2**) will validate Engagement Manager (**28**) availability (**25**, **26**,**27**,**29**). If an EM (**28**) is unavailable, the CSR (**2**) will set an appointment (**22**,**23**,**24**,**25**,**26**,**27**,**29**) for follow-up. If appointment (**22**,**23**,**24**,**25**,**26**,**27**,**29**) is not needed, the ticket (**14**) and client (**6**) is auto routed (**15**,**16**,**17**) through the system (**1**) based on the Consultant 2 Client (C2C) load balancing process (**25**,**26**,**27**,**29**). C2C (**25**,**26**,**27**,**29**). The ticket (**14**) and the client (**6**) is received in real time by an EM (**28**) responsible for scoping the engagement and ensuring that all contracts (**38**) and waivers (**38**) are signed (**42**,**33**,**7**). The EM (**28**) and client (**6**) interview (**32**) begins which leads to the automated scoping process (**44**,**8**,**9**,**38**,**70**). The EM (**28**) will input client interview (**32**) data into the system (**1**). The data will be inputted into a scoping engine (**70**), contained within the system (**1**) which will, according to the interview data (**32**) inputted, dynamically return scoping results (**44**,**8**,**9**,**38**,**70**) based upon interview (**32**) responses. Scoping results (**44**,**8**, **9**,**38**,**70**) may minimally include at least man hours, level of effort, size of engagement, delivery duration, human and technical resources needed, deliverables required, ancillary fees, project assumptions, potential risks and cost of engagement. The scoping engine (**44**,**8**,**9**,**38**,**70**) will minimally output auto-generated pre-populated project, cost and contract materials (**38**). The EM (**28**) and/or Consultant (**48**) and client (**6**) will collaboratively scope (**44**,**8**,**9**,**38**,**70**) the engagement together. This is an iterative automated process (**44**,**8**,**9**,**38**,**70**) until acceptance (**5**,**37**,**61**) and sign off (**38**) can occur. The interview (**32**) and scoping process (**44**,**8**,**9**,**38**,**70**) may be performed simultaneously via telephone (**66**,**52**,**53**) and on the portal (**46**,**51**,**59**, **47**,**31**,**41**). The Statement of Work (**38**), which includes scope (**38**) and an incremental acceptance and payment schedule (**38**), will eventually be accepted (**5**,**37**,**61**) and signed digitally (**42**,**33**,**7**) or a signed hard copy (**42**,**33**,**7**) uploaded via the portal (**46**,**47**,**31**,**41**). The EM (**28**) and client (**6**) will likewise collaborate (**10**,**11**,**12**,**13**,**50**,**51**,**52**,**53**,**58**,**59**, **31**, **41**,**46**,**47**) on the contract process (**5**,**37**,**61**,**38**,**42**,**33**,**7**).

This is an iterative automated process (**5**,**37**,**61**,**38**,**42**,**33**,**7**, **10**,**11**,**12**,**13**,**50**,**51**,**52**,**53**,**58**,**59**) until final acceptance (**5**,**37**, **61**) and sign off (**42**,**33**,**7**) can occur. The entire scoping (**44**,**8**,**9**,**38**,**70**), contract (**42**,**33**,**7**), acceptance (**5**,**37**,**61**) and signoff (**42**,**33**,**7**) process may be performed via telephone (**66**,**52**,**53**) and on the portal (**46**,**51**,**59**, **47**,**31**,**41**). Contract (**42**,**33**,**7**) will eventually be accepted (**5**,**37**,**61**) and signed digitally (**42**,**33**,**7**) or a signed hard copy (**42**,**33**,**7**) uploaded via the portal (**46**,**47**,**31**,**41**). Initial payment (**54**,**18**,**39**,**56**) for deliverable outsourcing (**1***c*) or life cycle professional services (**1***d*) is processed according to an automated Incremental Acceptance and Payment Schedule (**18**,**19**,**20**,**21**,**39**,**37**,**5**, **61**,**54**). The EM (**28**) will modify forms (**38**) as needed. To facilitate collaboration (**10**,**11**,**12**,**13**,**50**,**51**,**52**,**53**,**58**,**59**,**31**, **41**,**46**,**47**) with the client (**6**) to receive scoping acceptance (**5**,**37**,**61**), the EM will upload scoping (**44**,**8**,**9**,**38**,**70**) forms (**38**) to the portal (**46**,**51**,**59**, **47**,**31**,**41**). The EM (**28**) client (**6**) and/or consultant (**48**) will modify (**5**,**37**,**61**) forms (**38**) as needed until acceptance (**5**,**37**,**61**) and initial payment (**54**,**18**, **39**,**56**) occurs. Once the client (**6**) provides project initiation acceptance (**5**,**37**,**61**), signs (**42**,**33**,**7**) all pertinent paperwork (**38**) and makes initial payment (**54**,**18**,**39**,**56**), the ticket (**14**) and client (**6**) is auto routed (**15**,**16**,**17**) through the system (**1**) based on the Consultant 2 Client (C2C) load balancing process (**25**,**26**,**27**,**29**). The ticket (**14**) and the client (**6**) is received in real time by a Consultant (**48**) responsible for fulfillment and delivery.

[0027] As the consultant (**48**) fulfills (**40**,**50**,**51**,**10**,**11**) outsourced work, the system (**1**) enables the consultant (**48**) to minimally upload (**46**,**51**,**59**, **47**,**31**,**41**) paper documents, notes, and service record (**14**) details to the portal (**46**,**51**,**59**, **47**,**31**,**41**). This is an iterative and incremental process (**46**, **51**,**59**, **47**,**31**,**41**). The consultant (**48**) will continue this process according to the Incremental Acceptance and Payment Schedule (**18**,**19**,**20**,**21**,**39**,**37**,**5**,**61**,**54**) and until full payment (**54**,**18**,**39**,**56**), acceptance (**5**,**37**,**61**) and fulfillment activities (**40**,**50**,**51**,**10**,**11**) conclude. The client (**6**) can also use portal (**46**,**51**,**59**, **47**,**31**,**41**) functionality to perform project management tracking activities (**71**,**72**,**73**) which minimally include viewing real time project management stats, notes, history, analytics, and reports. The client is also able to chat or collaborate with consultants (**48**) via web based collaboration and conferencing (**55**) capabilities. Likewise, the portal (**46**, **51**,**59**, **47**,**31**,**41**) enable the consultant (**48**) to fulfill (**40**,**50**, **51**,**10**,**11**) and deliver (**43**,**58**,**59**,**12**,**13**) outsourced work products and paper deliverables remotely (**55**) and enables the client (**6**) to view outsourced work products and/or paper deliverables in real time. Ongoing support of projects will be fulfilled (**40**,**50**,**51**,**10**,**11**) and delivered (**43**,**58**,**59**,**12**,**13**) in the same manner.

[0028] The system (**1**) enables project closure. The project closure process (**62**,**64**,**65**) consists of the engagement manager (**28**) and the consultant (**28**) participating in an acceptance (**5**,**37**,**61**), and signoff (**5**,**37**,**61**) loop where the EM (**28**) and the consultant (**48**) work in an iterative manner to ensure that all tasks (**71**,**72**,**73**,**42**,**33**,**7**) and milestones (**71**,**72**,**73**,**42**, **33**,**7**) have been met. The culmination includes satisfying all conditions of the contract (**42**,**33**,**7**) and handing over final materials (**60**,**38**). Final signoff (**5**,**37**,**61**) include the client (**6**), the consultant (**48**) and the engagement manager (**28**) working collaboratively via telephone (**52**) and the portal (**46**,**51**,**59**, **47**,**31**,**41**).

[0029] Some of the commercial off the shelf (COTS)(**55**) software, tools, technologies and methodologies which may be used in achieving the full functionality of the system include: web conferencing, conference call technologies, webinars, email, document management, digitizing, file transfer protocol, remote control, IVR, ACD, CTI, CRM, ERP, project management, supply chain, logistics, field engineering, financial, e-commerce, billing, provisioning, project management, portal, call center, and SOA (Service Oriented Architecture). Though other technologies, tools, software and methodologies may be used, these are viewed as likely tools used to achieve system (**1**) performance. Any of these may be useful in designing the current system (**1**) architecture. The current invention shall, where appropriate, call upon the use of any current or future tools, technologies, software, methodologies or capabilities to perform its function.

Therefore, at least the following is claimed:

1. A computer readable medium comprising software for selling on-demand professional services via a fully automated retail framework, the software comprising instructions for:

receiving a request for the on demand full life cycle professional services remotely in a communication session;

fulfilling the request; and

delivering the professional services in real time.

2. The computer readable medium of claim **1**, wherein the request is fulfilled on the Internet or through the use of a call center undergirded by an automated technical service delivery platform.

3. The computer readable medium of claim **1**, further comprising instructions for at least one of:

outsourcing the professional services by the client and paying for the outsourced services in real time;

electronically creating or updating by a user of at least a project record source, conducting automated project needs analysis, receiving uploaded project materials and obtaining payment for delivery of services in real time;

electronically, by a practitioner, scoping, pricing, quoting, creating a contract, signing off on contracts, assigning delivery resources, notifying delivery resources, provisioning a project for fulfillment, and initiating projects in real time;

electronically, by practitioners, fulfilling projects remotely in line with industry standard methodologies and regulatory guidelines in real time; and

electronically, by practitioners, collaborating, presenting real time project fulfillment, automatically accepting payment for projects with an incremental electronic automated payment and acceptance process, viewing real time analytical statistics and historical reports, closing out projects and sending downloadable final deliverables in real time.

4. The computer readable medium of claim **1**, further comprising instructions for sorting of professional services into a first tier presented through a user interface, the first tier comprising at least one of:

on demand consultation;

on demand meeting contribution;

on demand deliverable outsourcing;

on demand project outsourcing; and

on demand staff augmentation.

5. The computer readable medium of claim **1**, further comprising instructions for sorting of professional services into a second tier presented through a user interface, the professional services sorted at least by industry sector and an organizational operating model.

6. The computer readable medium of claim **1**, further comprising instructions for communicating through at least one of a network, a call center, commerce or electronic commerce functions, billing functions, project management functions, CRM functions, ERP functions, collaboration functions, remote control functions and telecommunication functions.

7. The computer readable medium of claim **1**, wherein the request comprises at least one of:

an on-demand professional service element;

a record source;

a relationship;

a security role;

a responsibility;

a project scope;

a project price;

an industry sector categorization;

a delivery methodology;

a project payment;

a payment method;

a project acceptance; and

an industry sector regulation.

8. The computer readable medium of claim **1**, wherein at least one specialized NAICS 541 industry sector project management delivery methodology attribute and/or at least one specialized NAICS 541 industry sector regulatory attribute enables standardized and compliant on demand delivery of outsourced projects electronically.

9. The computer readable medium of claim **1**, wherein the instructions are configured to be implemented through a user interface to procure, transact, provision, fulfill, deliver and govern on demand outsourced projects over the Internet, the user interface further comprising a communication button that enables real time communication with at least one user.

10. The computer readable medium of claim **1**, further comprising instructions for accepting or terminating the communication session through a user interface.

11. The computer readable medium of claim **1**, further comprising instructions to trigger a communication based on at least one of a user or system data element, workflow, business rule algorithm and technical service.

12. The computer readable medium of claim **1**, further comprising instructions for, in response to sending or receiving a communication, fulfilling at least a part of the professional services request in collaboration with at least one user, in real time, through a user interface prior to terminating the communication session.

13. The computer readable medium of claim **1**, further comprising instructions for, in response to sending or receiving a communication, fulfilling or delivering remotely, in real time, at least a part of the professional services request by remote control of a user's system prior to terminating the communication session.

14. The computer readable medium of claim **1**, further comprising instructions for, in response to sending or receiving a communication, accepting payment for the professional service in real time using retail payment methods prior to terminating the communication session.

15. The computer readable medium of claim **1**, further comprising instructions for, in response to sending or receiving a communication, modifying, uploading, or downloading at least one element of a project document related to the professional service prior to terminating the communication session.

16. The computer readable medium of claim **1**, further comprising instructions for, in response to sending or receiving a communication, displaying at least one element of a work product related to the professional service to at least one user as the work product is being created or developed, the displaying occurring prior to terminating a communication session.

17. The computer readable medium of claim **1**, further comprising instructions for, in response to sending or receiving a communication, displaying at least one electronic report and/or real time analytic statistic in real time prior to terminating a communication session.

18. The computer readable medium of claim **1**, further comprising instructions for, in response to sending or receiving a communication, determining a route by which to send the communication, record source or data element, the route determined at least in part based on work load of at least one user or system program and at least one work load of at least one other user or system program associated with the route.

19. The computer readable medium of claim **17**, further comprising instructions for automatically determining the work load based on current projects in work in progress bin, hours of work, resources availability, skill set, competency, spoken language, delivery commitment, location, and client contact date and time.

20. The computer readable medium of claim **1**, further comprising instructions for determining the scope of a project in real time while providing at least one system program, logic and/or Internet web page for the user to determine the scope; wherein determining the scope includes at least automatically presenting a set of at least two questions to a user, wherein for at least one question, whether or not the at least one question is presented to the user, depends upon information previously provided by the user.

21. The computer readable medium of claim **1**, further comprising instructions for

presenting:

a dynamic logic tree of scope data in the form of questions; and

a data repository for answers to the dynamic logic tree of scope data;

automatically and dynamically deciphering a next set of logical questions based upon user answers;

processing and retrieving relevant scope data including at least man hours, level of effort, size of engagement, delivery duration, human and technical resources, deliverables required, ancillary fees, assumptions, potential risks, change control and cost of engagement; and

generating pre-populated forms and documents containing finalized results.

22. The computer readable medium of claim **1**, further comprising instructions for determining the price of a project in real time comprising presenting a set of at least two questions to a user, wherein for at least one question, whether or not the at least one question is presented to the user depends upon information previously provided by the user.

23. The computer readable medium of claim **1**, further comprising instructions for

presenting:

a dynamic logic tree of scope data in the form of questions; and

a data repository for answers to the dynamic logic tree of scope data;

automatically and dynamically deciphering a next set of logical questions based upon user answers;

processing and retrieving relevant price data wherein at least first tier commodity, second tier productized service, ancillary fees, and scope are presented to the user; and

generating pre-populated forms and documents containing finalized results.

24. The computer readable medium of claim **1**, further comprising instructions for determining contract stipulations of the professional service in real time while providing at least one system program, logic and/or Internet web page for the user to determine the contract stipulations; wherein determining contract stipulations includes at least automatically presenting a set of at least two questions to a user, wherein for at least one question, whether or not the at least one question is presented to the user depends upon information previously provided by the user.

25. The computer readable medium of claim **23**, further comprising instructions for

presenting:

a dynamic logic tree of contract stipulation data in the form of questions; and

a data repository for answers to the dynamic logic tree of scope data;

automatically and dynamically deciphering a next set of logical questions based upon user answers;

processing and retrieving relevant contract data wherein at least company data, customer data, scope, price, project data, contract stipulation data and ancillary fee data are presented to the user; and

generating pre-populated contract forms and documents containing finalized results.

26. The computer readable medium of claim **1**, further comprising instructions for automatically obtaining electronic signatures; processing and retrieving relevant electronic signatures wherein at least a signature is presented to the user; and generating pre-populated forms and documents containing finalized results.

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