

Mutual Success Project Plan

Customer <<company_name>>
Project owner at OurCo <<AE_name>>
Project owner at TheirCo <<champion>>
Others involved in the project at TheirCo
Last updated

Event

Date

Status

Purpose

OurCo Overview

Initial Discussion

Learn if <<OurCo>> has potential to solve current business challenges.

Demo Prep Call

Gather more information to make demonstration more relevant to <<TheirCo>>.

Overview Demonstration

Technical Conversation w/ <<technical_buyer>>

Platform Demo

Executive Meet & Greet

Opportunity for <<TheirCo>> to understand <<OurCo>> capabilities, and identify if <<TheirCo>> could be a partner to work with.

<<TheirExec>> and <<OurExec>> meet to align on vision

Scoping

Completion of Implementation Survey

Survey helps us develop a basic understanding of the scope of an <<product>> project at <<TheirCo>>.

Technical Feasibility Call

<<TheirCo>> provides full visibility to how their <<relevant_process>> works.

Completion of Feasibility Assessment

<<OurCo>> completes a Feasibility Assessment to send to Professional Services, so they can develop a SOW with a clear timeline of implementation.

Business Case

Completion of ROI Document

ROI / Business Case Presentation

Referrals

Complete ROI document with <<TheirCo>> info to give a clearer picture of what the quantitative benefits are.

Presented ROI to <<CFO / economic_buyer>>

Reference calls with <<ref1_company>> and

<<ref2_company>>

Professional Services Overview / Proposal Options

Review of Implementation Options

<<OurCo>> Professional Services team overviews the implementation process and timeline and reviews options, if there are any.

Pricing Proposal

Reviews software pricing options and determines best proposal to pursue going forward.

Final Decisions & Approvals

Redlines Completed

<<Their counsel>> will review the <<OurCo>> documents and send over any redlines.

Documents / Legal Review

Clear up legal concerns, address redlines, and confirm resolutions.

Sign-off

Execute documents.

Implementation & Go Live

Introduction to Services Call
Implementation Process

Introduce <<TheirCo>> to the Professional Services team who will run the implementation phase of the project <<x>> to <<y>> weeks

Go Live

Introduce <<TheirCo>> to support and start <<running / achievement benefit>>