

Mutual action plan

Build it backwards from the buyer's date. Every line needs a buyer owner. Security and legal start right after the NDA and run in parallel with the evaluation. Keep completed steps with the date they were done.

Stream	Step	Buyer owner	Our owner	Target date	Status	Done on
Header	Desired outcome and the buyer's target date (and why that date)					
Header	Go-live date					
Header	Signature date (go-live minus implementation time)					
Evaluation	Discovery complete and summary agreed					
Evaluation	Solution workshop with users					
Evaluation	Proof of concept with written success criteria (only if needed)					
Evaluation	Reference call					
Business case	Value model built with the buyer's own numbers					
Business case	Reviewed by finance					
Business case	Approved by the economic buyer					
Security and data	Security pack sent (start right after the NDA)					
Security and data	Security questionnaire completed					
Security and data	Data protection review and sub-processor check					
Legal	Standard terms sent (start right after the NDA)					
Legal	Redlines agreed					
Procurement	Vendor onboarding					
Procurement	Purchase order raised					
Signature	Named signer signs					
After signature	Kick-off held					
After signature	First value milestone reached					

Questions that map the paper process

Walk me through the last time you bought software of this size: who signed, which reviews did it go through, and how long did each take? | Who else needs to say yes, and what will each want to see? | How is this funded, and when does that budget close? | What could stop this after you have chosen a vendor?