

[Customer Company Name] – [Your Company Name]: Mutual Action Plan

Owner	For	Action	When	Complete
		Executive presentation		
		Feedback from executive meeting		
		Vendor selection finalized		
		Discuss project scope(s) for proposal creation		
		Discuss implementation plan		
		Discuss and confirm optional add-ons		
		Proposal(s) shared and discussed		
		Initial proposal response		
		Proposal agreed upon		
		Walk through of order form and MSA (and DPA)		
		Legal review, redline initiated		
		IT / Security review initiated		
		IT review complete		
		All redlines complete		
		Routing for agreement execution		
		Agreement fully executed		
Your Company		Access granted & virtual pre-work assigned		
[Customer project team]		Virtual pre-work completed	Week 1	
Your Company		Customer Success Manager assigned	Week 1	
Project Team + Your Company		Project Strategy Kick-Off Call	Week 2	
Project Team + Your Company		Weekly status calls, implementation work	Week 3-8	
		Go-live / launch**	Week 6	

[CUSTOMER COMPANY NAME] Team:

- XXX – role, project sponsor
- YYY – role, executive sponsor
- ZZZ – CFO, signatory
- WWW – GC, Legal
- VVV – CEO

[YOUR COMPANY] Team:

- AAA – account executive
- BBB – executive sponsor
- CCC – Customer Success