**Joint Action Plan**

**PARTNERSHIP ANALYSIS**

*Between:*

Buyer Co. Name and Selling Co. Name

**Insert Buyer**

**Company Logo**

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**PRIMARY CONTACTS**

SELLER COMPANY NAME:

* TBD, Senior Account Executive
* TBD, Regional Vice President
* TBD, Senior Solution Engineer

BUYER COMPANY NAME:

* TBD, System Administer
* TBD, Group Vice President

**SOLUTION VALUE SUMMARY**

Insert narrative describing the value the solution will provide to the buying company. If applicable insert reference to the ROI the buying company can expect from investing in this solution.

**OBJECTIVE REVIEW**

SELLER COMPANY NAME and BUYER COMPANY NAME Key benefits include:

* TBD
* TBD
* TBD

**SELLER COMPANY NAME - AREAS OF ALIGNMENT**

1. TBD
2. TBD
3. TBD

The remainder of this document serves as an outline of actions to initially formulate the partnership, but then drive the tasks necessary to ensure success within the partnership.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **PRE-CONTRACT** | | | | | |
| **Milestone** | **Status** | **Owner** | **Due Date** | **Recipient** | **Next Steps/Comments** |
| **Discovery Call** | Completed | SELLING CO. OWNER | 7/17/18 | BUYER CO. OWNER | Key functionality requirements identified |
| **Product Demo** | Completed | SELLING CO. OWNER | 7/26/18 | BUYER CO. OWNER | Per the request to see the application the determination was made that rental equipment distribution wasn’t available |
| **Deep Dive Discussion** | Completed | SELLING CO. OWNER | 12/22/18 | BUYER CO. OWNER | Requested to discuss and review additional functionality following original Demo. |
| **Initial demo W/ IT** | Completed | SELLING CO. OWNER | 1/11/19 | BUYER CO. OWNER | Completed partial demo and in-depth InfoSec/IT discussion |
| **Second Demo** | Completed | SELLING CO. OWNER | 1/22/19 | BUYER CO. OWNER | Follow-up demo to cover functionality we ran out of time to feature in the first session |
| **Pricing Presentation** | Competed | SELLING CO. OWNER | 2/12/19 | BUYER CO. OWNER | Presentation of pricing for the software and professional services along with ROI model and included features. |
| **Quote Delivery** | **In process** | SELLING CO. OWNER | 2/26/19 | BUYER CO. OWNER | Documents are currently being generated |
| **CONTACT REVIEW** | | | | | |
| **Quote Review** |  | Darrell | 3/15/19 | BUYER CO. OWNER |  |
| **Redline Reviews** |  | Paul | 3/28/19 | BUYER CO. OWNER |  |
| **Routing for Signature** |  | Darrell | 5/1/19 | BUYER CO. OWNER |  |
| **POST CONTRACT** | | | | | |
| **Kickoff with PS** |  | Professional Services | 6/1/19 | BUYER CO. OWNER |  |
| **System Configuration** |  | Professional Services | 11/1/19 | BUYER CO. OWNER |  |
| **Testing/Fixes** |  | Professional Services | 12/1/19 | BUYER CO. OWNER |  |
| **Rolling go Live** |  | Professional Services | 12/15/19 | BUYER CO. OWNER |  |