Illustrative delivery brief

Customer onboarding. From handoff to ownership.

A practical example of how an implementation mandate can be defined, governed and accepted.

Fictional situation. Not a client case or commercial proposal.
No assumed fee, duration, team availability or achieved result.

The priority

Put a consistent workflow into operation from sales handover to onboarding acceptance, within agreed teams and systems.

The starting position

In this illustration, responsibilities are unclear and required customer information is repeatedly missing. Actual volumes, systems, baseline, people and delivery capacity would be confirmed before any commitment.

Included work

Map the workflow, decisions and required information. Agree revised handoffs, ownership and controls. Implement accepted process changes and expressly scoped configuration. Pilot, resolve agreed issues, prepare guidance and support rollout.

Scope boundaries

Full platform replacement, new integrations, changes to customer contracts, ongoing outsourced operation and work outside agreed teams are excluded unless expressly added.

This example describes a possible workstream after selection. It does not establish market eligibility, company fit or delivery fit.

Deliverables and acceptance

The actual proposal names accepting individuals and finalises criteria. These roles show the responsibilities to establish.

Deliverable	Acceptance evidence	Company owner
Agreed workflow	Documented steps, required information, control points and responsibilities approved.	Process owner
Implemented pilot	Agreed tests completed; issues resolved or explicitly accepted with owners.	Pilot lead
Rollout and guidance	Included teams have access, guidance and preparation required to use the workflow.	Operating lead
Operating handover	Named ongoing owner, current documentation, review measures and acceptance record.	Sponsor or delegate

Delivery gates

Scope accepted; workflow approved; pilot accepted; rollout completed; handover accepted.

Timing and dependencies

Dates follow confirmed scope, resources and dependencies. A fixed duration is not implied. Unresolved requirements are recorded before commitments are made.

Responsibilities and review

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Carry out agreed implementation tasks, coordinate workstreams, support testing, report progress and prepare the agreed handover.

Company team

Provide sponsorship, required people, reliable information and access. Make reserved decisions, own the process and accept deliverables.

Specialist providers

Deliver only professional or technical work expressly assigned under the appropriate agreement, permissions and review arrangements. Named people, capacity and authority are confirmed before mobilisation.

Measures to establish

Define onboarding time, repeated information requests, workflow adoption and unresolved handoffs. Agree the baseline, data source, owner and review point for each measure. Report implemented changes separately from later business outcomes; targets follow the confirmed baseline.

Dependencies to resolve

Record access requirements, company resources, data reliability, partner support and outstanding decisions. Give each dependency an owner and escalation route. Agree review cadence and document actions, decisions and due dates.

Changes to scope, cost, timing or responsibilities require agreement before additional work proceeds. Missing information, resources or authority may require a pause or revised plan.

Completion and operating handover

Completion follows agreed acceptance criteria and transition obligations. Outstanding items remain visible with owners, due dates and an agreed treatment.

Acceptance record

Record the deliverables accepted, supporting evidence, accepting person and any agreed exceptions.

Continuing ownership

Transfer guidance, operating records and knowledge. Confirm access arrangements and the team responsible for maintaining the workflow.

Separate future scope

Ongoing support or management requires a separate agreement. Project completion does not imply continuing outsourced operation.

Commercial and information arrangements

Fees, payment terms, confidentiality, data ownership, security requirements and contractual terms belong in the actual proposal and agreement. This illustration establishes none of them.

An actual mandate follows selection and an agreed scope. This brief is illustrative and does not constitute an offer or delivery commitment.

Explore the delivery model

Defined execution mandate
Initiative implementation