

# Mutual Success Plan: [Prospect Name] + Go1

#VALUE!

## GOALS

## CONTACT INFO

This mutual success plan (MSP) is designed to help us jointly navigate the evaluation process as effectively and efficiently as possible. **Go1** This collaborative, living document includes the key milestones, dates, and owners as we explore our partnership together. Feel free to [NAME], [MOBILE], [EMAIL] share this document with other stakeholders that are or will be a part of this evaluation.

Our mutual success plan outlines the path to:

- [Business objective #1] (example: Increase the average score on the employee learning experience survey from 65% to 75% by the end of Q4 2023. Measure this by administering a survey to all employees beginning and end of Q4)
- [Business objective #2] (example: Identify and assess the skill gaps of all employees in the sales department by the end of Q1 2024. Implement a training program to bridge these gaps by the end of Q2 2024. Measure by conducting a skills assesment pre and post training.)
- [Business objective #3] (example: Launch new compliance training content to all employees by the end of Q1 2024 and ensure that 100% of employees complete the training by the end of Q2 2024. This will be measured by tracking the number of employees who have launched and completed the training.)

**[Prospect Name]**  
[NAME], [MOBILE], [EMAIL]

## RESOURCES

Links to decks, docs, etc. (example: Business case deck, Skills for Business Success PDF, playlists,

## NEXT STEPS

Status	Milestone	Target Date(s)	[Prospect Name] Owner(s), Title(s)	Go1 Owner(s)	Partner Owner(s)	Notes
	<b>Initial business review &amp; product demo(s)</b>					<i>Track stakeholder involvement and timing (especially those critical to advancing to the next milestone) in the sub-fields below)</i>
Not started						
Not started						
Not started						
Not started	<b>Executive sponsor alignment and sign-off</b>					<i>Include name(s) and titles(s) for the exec sponsor(s)</i>
Not started	<b>Pricing proposal</b>					
Not started	<b>Technical review (feasibility, integrations, etc.)</b>					
Not started	<b>Pilot (scoping, launch, debrief)</b>					
Not started	<b>Legal review (MSA, order form, etc.)</b>					
Not started	<b>Security review</b>					
Not started	<b>Contract execution</b>					
Not started	<b>Implementation (kickoff, etc.)</b>					
Not started	<b>Go-live!</b>					
Not started	<b>Initial business review / quarterly biz review</b>					

Not started  
Confirm on next call  
In-process  
Complete