WORKING PAGE 01

The channel decision page

Record the evidence, decisions and next actions. Use your own information and label assumptions.

Which customer segment are we working with, and what problem needs solving?

What work is needed from discovery to renewal, and who owns each step?

Which routes do we use now, and who is responsible for each?

Which channel task could we delegate? Name the responsible manager and the team receiving the work.

What are we measuring, over which period, and where does the data come from?

Which capability or capacity is missing?

How does the arrangement work financially for the vendor and the partner?

What have we decided, who owns the action and when will we review it?

WORKING PAGE 02

The partner commitment page

Record the evidence, decisions and next actions. Use your own information and label assumptions.

Why is this partner a good fit for the requirement?

Who will be responsible for sales, technical work and service? Name each person.

What evidence shows the partner's capability, and which gaps remain?

Which people will the partner provide, and how much time will they invest?

Which resources will the vendor provide?

How will we prevent others from free-riding on this partner's work?

What is the first meaningful customer activity, who owns it and when will it happen?

What needs to happen before we invest further?

WORKING PAGE 03

The AI service decision page

Record the evidence, decisions and next actions. Use your own information and label assumptions.

Which customer process are we changing, who owns it and what is the current baseline?

What is the AI task or agent workflow? Who will use it, and which information is approved?

Which actions are permitted? Which decisions and approvals stay with people, and where must the system stop?

Which record governs each important field? Note any conflicts or missing information.

Which sample will we use for evaluation, and what are the acceptance criteria?

What is the complete effort before and after the change? Include checking, correction and exceptions.

Where can the service fail, and what do we still not know?

Which configuration and version are approved? Name the people responsible for deployment, changes, recovery and escalation.

What are the responsibilities of the AI Partner, customer, platform providers and other specialists?

Who leads deployment, builds the service, reviews acceptance and owns the handover?

What does the service cost to operate? State the price, included usage and scope limits.

WORKING PAGE 04

The compliance evidence page

Record the evidence, decisions and next actions. Use your own information and label assumptions.

Which countries, customer and service are covered? Which rules and national implementations apply?

What is our role under each relevant law, and what is each supplier's role? What remains the customer's responsibility?

How have we classified the use case, and why? Which requirements already apply, and which dates are still ahead?

Which contract clauses are required? Record the service classification and where the documents are kept.

What do the model provider's data terms say about training use, retention, processing regions and sub-processors?

Where are the evaluation, human oversight and AI literacy support records?

What are the incident thresholds, reporting path and applicable deadlines? What notification duties do suppliers have?

What is the exit plan? Record the tests, data return or deletion arrangements and handover responsibilities.

Who owns the record, and when is the next review? Who checked the legal position, and when?

WORKING PAGE 05

The service review page

Record the evidence, decisions and next actions. Use your own information and label assumptions.

What did the customer originally want to achieve?

What use and quality have we observed, and how much correction work was needed?

Which incidents have occurred, and what service obligations currently apply?

What has changed in the sources, permissions and components?

How does usage compare with the included band? What are the costs and contribution?

What have we learned, and what backup capability do we have?

Should we renew, expand or exit the service?

WORKING PAGE 06

The people development page

Record the evidence, decisions and next actions. Use your own information and label assumptions.

What is the person's responsibility, and what should they deliver?

What evidence do we have of reliability, and where is improvement needed?

What learning should the person apply in the next period?

Which customer evidence or changed assumption explains the learning needed?

What is one original improvement we can test?

Which AI task will the person do, how will they check it and what are its limits?

What practical AI work has the person demonstrated? Which outputs did they accept, correct and reject?

What practice will they have, who will mentor them and what time will be protected?

When will they demonstrate the work, and what was the review outcome?

Which decision or process should improve next? Name the responsible person and a review date.

WORKING PAGE 07

The market evidence page

Record the evidence, decisions and next actions. Use your own information and label assumptions.

What is the claim, and which decision could it influence?

Which market definition, geography and period does it cover?

What is the source? Record its publication date and the date we accessed it.

Is this an observed result, an estimate, a forecast or a scenario?

What important exclusions and uncertainties do we need to consider?

What does our own local evidence show, and how does it differ?

Which signal should we watch, what action does it support and when will we review it?

WORKING PAGE 08

The alliance commitment page

Record the evidence, decisions and next actions. Use your own information and label assumptions.

Which arrangement are we building, which customer problem does it address and what does each side earn?

Who are the sponsor, alliance lead and field contact on each side, and what can each approve?

What people, funding, labs, technical help and time does each side commit?

Which first accounts will we work on, and what information may we share for that purpose?

How will we record source, influence, the purchase route, delivery and any platform recognition without double counting?

Who owns the integration, the first support call, acceptance and the customer handover?

What is the first joint customer activity, who owns it and when will it happen?

What evidence and contribution will we review next quarter, and what would make us change or stop the plan?

WORKING PAGE 09

The country entry page

Record the evidence, decisions and next actions. Use your own information and label assumptions.

Which country, customer group, offer and purchase route are we planning for?

Which currency is quoted and invoiced, and who carries exchange-rate changes before collection?

What are the payment dates, instruments and credit limits, and who funds the work until collection?

Which tax, withholding, e-invoicing and public-sector purchasing conditions apply?

Where will information be processed, and which data, transfer and registration requirements apply?

Which local partners or distributors are involved, who owns them and what does each deliver?

Which bribery, sanctions and export-control checks are needed, and who resolves exceptions before we proceed?

Which local evidence supports the plan, who checked the legal and financial position and when will we review it?