5 Rights, "Make it Right" (MIR) - Deal Lifecycle

RIGHT SOLUTION	RIGHT DEAL	RIGHT TEAM	RIGHT TIME	RIGHT LOCATION
problem statement, win theme, value prop, proposal, scope, approach, deliverables, solution, architecture	estimate, price, rates, discounts, profitability, contract, legal, approvals	Account Manager, Delivery Manager, Enterprise Architect, Business Dev, Staffing Coordinator, Team Lead, Project Manager, Exec Sponsorship, Delivery Practice, Rest of Dev Team CUSTOMER - customer, buyer, sponsor, budget authority, champions, coaches, distractors	time to start, project duration, timelines	delivery location, secured perimeter

RIGHT COMMUNICATION, TEAM WORK

Introductions, onboarding, knowledge transfer/sharing, clear roles and responsibilities, know teammate names, planning, have kickoffs, hold briefings, communication plans, governance, retrospectives to learn from mistakes and successes, ask about team concerns, iterate, continuously improve

5 Rights, "Make it Right" (MIR) - Deal Lifecycle - Checklist

Right Solution	Right Deal	Right Team	Right Time	Right Location	Right Communication/Teamwork
☐	☐	☐	☐	☐	☐
☐ Problem Statement, Challenge, Pain Points, Drivers	☐ Qualified __	☐ ALL Staffing Desk Positions Opened per Resource Plan	☐ Project Duration __	☐ Delivery Location(s) __	☐ Deal Review/Approval Meeting conducted __
☐ Value Proposition	☐ Deal Size $ __ ; Forecast in CRM __	☐ Startup/Seed Team (during Proposal, POC)	☐ Start Date __	☐ Secured Perimeter Required? Yellow Room __ ; Red Room __	☐ Internal Kick-off
☐ Win Themes, Message, WHY US • __ __ • __ __ • __ __	☐ P&L Model: AM% __ ; CM % __	☐ Account Manager __	☐ End Date __		• Introductions Made __ • Concerns voiced by everyone __ • Team reviewed "Right Solution" list __ • Estimate, Timelines verified by Delivery __ • Clear roles & responsibilities stated __ • Everyone knows everyone by name __
☐ Proposal	☐ Rates: Standard __ ; Custom __	☐ Delivery Manager (onshore) __			☐
☐ Scope	☐ Rate Discount __	☐ Delivery Manager (offshore) __			☐ Customer Kick-off with all Team
☐ Out of Scope	☐ Annual COLA % __	☐ Bus Dev __			☐ Project Plan, Sprint Plan, Backlog
☐ Approach	☐ Volume Discount __	☐ Enterprise Architect __			☐ Knowledge Transfer start, KB, etc.
☐ Deliverables	☐ Penalties Yes __ ; No __	☐ Staffing Coordinator __			☐ Onboarding Process setup, start, KB, etc.
☐ Solution	☐ Limits of Liability (LoL) Cap __	☐ Team Lead __			☐ Background Check
☐ Architecture	☐ Required PHI __ ; PII __ ; HIPAA __	☐ Project Manager __			☐ Criminal Check
☐ Resource Plan	☐ BAA (Y/N) __	☐ Exec Sponsor __			☐ Drug Testing
☐ Price, Estimate	☐ At Risk Amount (ARA): % __ ; Weights __	☐ Delivery Solution Practice Sponsor __			☐ Individual NDAs signed (if necs.)
☐ Assumptions	☐ Termination For Convenience: Company __ ; Customer __	☐ Delivery Solution Practice Lead __			☐ Team Manifesto or any custom forms per each team member signed (if necs.)
☐ Engagement Model (Assessment, Workshop, POC, Sprint 0, MVP, etc.)	☐ Warranty __	☐ Customer – Buyer __			☐ Communication Plan (Internal/External) scheduled (recurring)
☐ Proposal Shared on Dropbox or OneDrive	☐ Approvals: BU __ ; Delivery __ ; CFO __	☐ Customer – Sponsor __			☐ Governance, QBRs scheduled (recurring)
	☐ MSA __	☐ Customer – Budget Owner __			☐ Retrospectives scheduled (recurring)
	☐ SOW __	☐ Customer – Champion __			☐ Account Plan Updated
	☐ Deal Summary Shared on Dropbox or OneDrive	☐ Customer – Coach __			
		☐ Customer - Distractor __			