

Coordinate a cross-functional enterprise deal rescue for a fictional B2B SaaS provider. A prospective customer is considering a GBP120,000 ann

AI Collaboration - Execution Report

Unified Enterprise Deal Rescue Decision Package

Enterprise Deal Rescue Decision Package

1. Executive summary

Recommendation: Conditional GO for a non-binding, qualified proposal; NO-GO for contractual commitments at this stage.

The GBP120,000 annual opportunity is potentially viable, but critical facts remain unverified:

- CRM integration feasibility and delivery effort.
- Security and legal requirements.
- Support capacity and SLA economics.
- Implementation staffing and customer-side readiness.
- Scope, licensing, liability and commercial boundaries.

A credible 72-hour response should present a dependency-based implementation approach, not guaranteed dates or capabilities. No customer communication, CRM update, contract, booking or implementation has been executed.

Important limitation: Morgan's commercial assessment was not included in the supplied upstream outputs. Commercial conclusions below are therefore provisional and require Morgan/commercial-owner validation.

2. Requirements-to-capability matrix

Prospect requirement	Current assessment	Evidence required	Decision position
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Onboard 250 users	Operationally plausible; effort unknown	Licensing, provisioning, identity model, role limits and capacity plan	Conditional
Three departments	Scope known; workflows unknown	User counts, department processes, champions and acceptance criteria	Conditional
CRM integration	Unverified critical dependency	CRM/version, APIs, objects, authentication, sandbox, data flows and testing ownership	Discovery gate
Security review	Required; requirements unknown	Questionnaire, certifications, residency, encryption, retention, DPA and testing evidence	Security gate
Phased rollout	Feasible in principle	Pilot cohort, rollback criteria, readiness checks and target business date	Recommended
Support SLAs	Not contract-ready	Support hours, severity definitions, capacity, escalation, remedies and exclusions	Approval gate
GBP120,000 annual economics	Commercial viability unconfirmed	Delivery effort, support cost, licensing, integration/customisation and margin model	Commercial gate

No product capability should be represented as verified until validated by Product, Engineering, Security or Support.

3. Proposed phased implementation

These are planning stages, not committed dates.

1. Mobilisation and discovery

- Confirm executive sponsors, department owners, scope, success measures and customer dependencies.

2. Technical and security validation

- Validate CRM architecture, data mapping, authentication, environments and security requirements.
- 3. Architecture and effort approval
 - Produce delivery estimate, resource plan, integration approach and commercial impact assessment.
- 4. Configuration and preparation
 - Configure approved workflows, roles, access, test cases, training and support procedures.
- 5. Controlled pilot
 - Launch with one representative department or limited cohort.
 - Validate workflows, CRM behaviour, reporting, support routing and security controls.
- 6. Sequential departmental rollout
 - Expand by department only after readiness and acceptance checks.
- 7. Stabilisation and handover
 - Monitor adoption, defects, integration performance and support demand; complete operational handover.

Stage gates

- Gate 0: Commercial scope, pricing framework and resourcing approved.
- Gate 1: Discovery complete; CRM and security requirements documented.
- Gate 2: Architecture, effort and delivery plan approved.
- Gate 3: Configuration and testing exit criteria met.
- Gate 4: Pilot acceptance signed off.
- Gate 5: Each department passes rollout readiness review.
- Gate 6: Stabilisation and support handover accepted.

4. Risk register

Risk	Rating	Mitigation	Go/no-go condition
CRM capability or effort unsuitable	Critical	Technical discovery and proof of concept if needed	No commitment before feasibility approval
Security requirements exceed assumptions	Critical	Early questionnaire and security/legal gap assessment	No contractual security promise before approval
SLA exceeds support capacity	Critical	Capacity model and approved service design	No enhanced SLA without Support approval
GBP120,000 economics do not cover	Critical	Cost, margin and scope analysis	Commercial approval required

delivery/support			
250-user rollout exceeds staffing	High	Named resources, pilot and rollout waves	Re-scope or defer
Department workflows are unclear	High	Process workshops and acceptance criteria	No rollout without validated scope
Customer delays access or decisions	High	Dependency log and decision deadlines	Dates remain indicative
Customisation or scope expansion	High	Baseline scope and change control	Commercial reapproval
Data quality or migration issues	Medium/High	Data profiling and test migration	Pilot blocked until accepted
Adoption/training shortfall	Medium	Champions, role-based training and adoption metrics	Additional enablement may be needed
Security incident treated as routine support	Critical	Separate mandatory security escalation path	Security owner approval required

5. Support and escalation model

Proposed, subject to approval

Phase	Support approach
Discovery	Support participates in service design and documents escalation routes
Pilot	Dedicated implementation-support contact and frequent launch checkpoints
Department rollout	Business-hours support, weekly issue review and trend reporting
Stabilisation	Standard support model, knowledge transfer and handover
Steady state	Standard tier; enhanced coverage only through separate approval

Planning severity model

Severity	Example	Indicative initial response
Sev 1	Broad outage or material core-service impact	1 business hour
Sev 2	Major function unavailable	4 business hours
Sev 3	Degraded function with workaround	1 business day
Sev 4	Question or minor defect	2 business days

These are not contractual targets. Resolution times, 24/7 coverage, service credits, remedies and out-of-hours support must not be promised.

Escalation path

Customer admin ? Support triage ? Support lead ? Engineering/Product or Integration owner ?

Incident/executive escalation. Security or contractual matters route immediately to

Security/Legal. Account and Delivery leadership review recurring incidents, scope changes and commercial impact.

Required safeguards include named primary and backup owners, customer champions, ticket severity definitions, incident logging, rollback criteria, handover checklist and rollout capacity checks.

6. Responsibility matrix

Workstream	Delivery	Product/Engineering	Security/Legal	Support	Customer
Scope and governance	R	C	C	C	A/R
CRM discovery/design	R	A/R	C	C	A/R
Security review	C	C	A/R	C	R

Configuration/testing	A/R	C	C	C	R
Training/readiness	A/R	C	C	C	A/R
Pilot acceptance	R	C	C	C	A
Rollout decisions	R	C	C	C	A
Support transition	R	C	C	A/R	C
SLA design	C	C	C	A/R	C
Change control	R	C	C	C	A

Assignments remain provisional until named individuals and teams are confirmed.

7. Unresolved questions

Commercial

- What exactly is included in the GBP120,000?
- Are onboarding, integration, migration and enhanced support included?
- What margin, discount, liability and change-control limits apply?
- Is a fixed go-live date being requested?
- What bespoke obligations or service remedies are being sought?

Technical and delivery

- Which CRM, version and data objects are involved?
- What authentication, API, sandbox and test-data access exists?
- What are the three departments' user counts and workflows?
- What data migration, identity and reporting requirements apply?
- Can implementation, Engineering and Security staff be allocated?

Security/legal

- Which standards, certifications, residency and contractual controls are required?
- Are DPA, penetration-test, audit or bespoke security commitments expected?

Support

- Required service hours and out-of-hours expectations?
- Customer administrator and department champion availability?
- Required escalation contacts, remedies and reporting?
- Can support absorb 250-user rollout volume?

8. Proposed customer-facing response

We can provide a conditional implementation approach within the requested timeframe. Our proposed model is to begin with mobilisation and discovery, validate the CRM integration and security requirements, configure and test against agreed acceptance criteria, run a controlled pilot, and then roll out sequentially by department.

The plan will be dependency-based rather than a fixed go-live commitment until the CRM architecture, security requirements, customer data/access, resourcing and acceptance criteria are confirmed.

We will also propose a support and escalation framework covering severity definitions, support ownership, incident escalation and rollout handover. Any SLA targets, enhanced coverage, remedies or contractual security commitments will remain subject to technical, operational, commercial, security and legal approval.

The next step would be a joint discovery session to confirm scope, dependencies, responsibilities and decision dates.

This wording is a proposed draft only; it has not been sent.

9. Final recommendation and approval gates

Conditional GO

Proceed with a qualified, non-binding proposal only if it:

- Clearly labels assumptions and exclusions.
- Uses dependency-based milestones.
- Avoids unverified product claims.

- Assigns internal and customer-side owners.
- Includes change control and acceptance gates.
- Is approved commercially and operationally.

NO-GO / pause triggers

Pause or reject the opportunity if:

- CRM feasibility remains unvalidated.
- Required resources cannot be allocated.
- The prospect requires a fixed date before dependencies are known.
- Security, SLA, liability or service-credit commitments lack approval.
- The scope exceeds approved economics or delivery capacity.

Required approvals before commitment

1. Commercial/Finance: GBP120,000 economics, scope, margin and commercial constraints.
2. Product/Engineering: CRM feasibility, architecture and effort.
3. Delivery: resourcing, sequencing, milestones and acceptance criteria.
4. Support: hours, staffing, tooling and escalation capacity.
5. Security/Legal: security evidence, data handling, SLA language, liability and remedies.
6. Executive sponsor: residual risk and final go/no-go decision.
7. Customer: named owners, access, data, decision deadlines and acceptance responsibilities.

Overall decision: GO for controlled proposal development; NO-GO for unconditional implementation, SLA or contractual commitments.