

Act as a coordinated enterprise customer onboarding team for a fictional B2B SaaS provider. A new enterprise customer has signed an agreement

AI Collaboration - Execution Report

Enterprise Customer Requirements & Sales Handoff

Sales-to-Delivery Handoff: Fictional Enterprise Customer

Status: Planning artifact only. No customer records, bookings, permissions, integrations, communications, or contractual terms have been verified or executed. The 21-day period is a target for feasibility assessment, not a commitment.

1. Customer Requirements Matrix

Area	Current scenario requirement	Confirmed vs. pending	Delivery implication
Customer scope	Enterprise rollout for 300 users	Scenario-level fact	Requires validated user population and batch provisioning plan
Departments	Four departments; names and sizes not provided	Pending	Operations must confirm cohorts, priorities, and dependencies
Business objectives	Successful adoption, CRM integration assessment, controlled access, training, support readiness	Scenario-level objectives	Define measurable launch criteria with customer sponsor
Stakeholders	Executive sponsor, customer administrator(s), department leads, IT/security, CRM owner, vendor delivery lead	Roles required; identities unknown	Obtain names, authority, availability, and escalation paths
CRM integration	Assess feasibility,	No CRM, scope, or	Discovery and technical

	data flows, authentication, permissions, and testing approach	commitment verified	assessment required before implementation decision
User access	Role-based access for 300 users	Requirement stated; role model unknown	Map job functions to least-privilege roles and approval owners
Administrator training	Training required for customer administrators	Timing, number, and format pending	Schedule prerequisite for customer-owned administration
Department onboarding	Department-level sessions required	Department composition and session needs pending	Size sessions and identify champions
Support	Support readiness and post-launch care required	Service model and hours not specified	Define channels, severity levels, escalation ownership, and coverage
Rollout timing	Target 21-day rollout	Target only; not verified commitment	Operations to validate feasibility after discovery
Success criteria	Launch readiness and adoption across four departments	Metrics not yet agreed	Establish acceptance criteria, attendance, access, integration, and support KPIs

2. Commercial-to-Delivery Handoff Matrix

Handoff item	Sales provides	Delivery must validate	Owner / dependency
Scope	300 users, four departments, stated onboarding components	Exact inclusions/exclusions and user counts	Sales + customer sponsor
Timeline	21-day target	Critical path, customer availability, technical lead time	Operations
Stakeholders	Required stakeholder categories	Named contacts and decision authority	Sales/customer
Integration	CRM assessment requested	CRM platform, environments, APIs, security, data ownership	Technical/Operations

Access	Role-based access required	Role catalog, provisioning method, approvers, SSO/MFA requirements	Operations + customer IT
Training	Admin and department sessions required	Audience size, format, language/time zone, prerequisites	Scheduling
Support	Readiness and post-launch care expected	Channels, hours, severity definitions, escalation SLAs	Support + customer
Acceptance	Executive launch-readiness decision required	Sign-off authority and objective GO/NO-GO criteria	Executive sponsor + delivery
Commercial boundaries	No pricing, discount, SLA, guarantee, or implementation commitment supplied	Confirm signed terms before promising delivery	Sales leadership/legal as applicable

3. Department-Level Discovery Template

For each of the four departments, collect:

- Department name, user count, locations, and time zones.
- Primary workflows and expected use cases.
- Required roles and permissions.
- Data access or segregation requirements.
- Department lead and onboarding champion.
- Training audience, preferred format, and availability.
- Adoption risks, accessibility, language, and change-management needs.
- Department-specific acceptance criteria.

Current gap: Department names, headcounts, workflows, role requirements, and session availability are unknown.

4. Required Clarification Questions

Scope and commercial

1. What exact products, modules, environments, and services are in scope?
2. Does the agreement define implementation milestones, support coverage, response targets, or customer dependencies?

3. Is the 21-day target contractual, aspirational, or internally desired?
4. What items are explicitly out of scope?

Stakeholders and governance

5. Who is the executive sponsor and final launch approver?
6. Who owns customer IT, security, CRM, user provisioning, and department decisions?
7. What is the escalation path when decisions or inputs are delayed?

Integration

8. Which CRM platform and edition are used?
9. Is the expectation assessment only, or configuration/deployment as well?
10. What authentication, API, sandbox, data-mapping, privacy, and security requirements apply?
11. Who supplies test data and approves integration results?

Access and data

12. What roles are required, and how are role assignments approved?
13. Is SSO/MFA required?
14. What user file format and mandatory fields will be supplied?
15. Are there regional, privacy, retention, or segregation constraints?

Training and support

16. How many administrators and department participants require training?
17. What time zones, languages, accessibility requirements, and blackout dates apply?
18. What support channels and coverage hours are expected?
19. What constitutes successful onboarding and launch?

5. Handoff Risks and Controls

Risk	Impact	Control / decision needed
Missing department/user data	Cannot size sessions or provision access	Set a data deadline and use a documented assumption register
Unverified CRM scope	Critical-path integration delay	Run discovery before committing to implementation dates
Undefined roles	Excessive access or provisioning rework	Customer-approved role matrix and least-privilege review

Unnamed decision-makers	Blocked approvals and delayed launch	Confirm sponsor, approvers, and escalation contacts
Training availability conflicts	Reduced readiness	Collect availability early; reserve contingency sessions
Ambiguous commercial terms	Scope disputes or unsupported promises	Sales/legal confirmation before delivery commitments
21-day target infeasible	Missed expectation	Operations feasibility gate and conditional timeline
Support model unspecified	Poor post-launch experience	Support readiness review and approved escalation model

6. Downstream Handoff to Operations and Scheduling

Inputs for Operations

- Plan around 300 users and four departments, pending validation.
- Treat CRM work as an assessment gate, not a confirmed implementation commitment.
- Build a dependency-driven feasibility plan with explicit customer input deadlines.
- Include access-role design, provisioning, testing, administrator readiness, and executive GO/NO-GO review.
- Do not assume SSO, CRM platform, data availability, or contractual SLAs.

Inputs for Scheduling

- Schedule administrator training plus one onboarding session per department, subject to confirmed audience sizes.
- Collect time zones, preferred formats, accessibility needs, blackout dates, and named attendees first.
- Use tentative holds only after authorized scheduling procedures are confirmed.
- Define reminders, attendance tracking, recording policy, and rescheduling rules.
- Maintain contingency capacity for missed or delayed sessions.

Required upstream decisions

1. Validate customer contacts and department composition.
2. Confirm CRM platform and assessment scope.
3. Approve role/access model.
4. Confirm training audiences and availability.
5. Confirm support expectations and launch approval authority.
6. Decide whether the 21-day target is feasible after discovery.

Recommended handoff status: Pending customer discovery and commercial validation; not ready for delivery commitment.

Enterprise Implementation & Operational Rollout Plan

Enterprise Implementation & Operational Rollout Plan

Status: Planning proposal only. No integrations, permissions, bookings, user provisioning, communications, or workflows have been executed. The 21-day timeline is conditional and not a verified commitment.

1. Feasibility Assessment

The target may be feasible only if customer inputs and approvals arrive on schedule. Critical unknowns are:

- CRM platform, edition, environment, API access, data flows, and whether deployment is in scope.
- Department names, user counts, workflows, role requirements, and time zones.
- Identity model, SSO/MFA requirements, provisioning method, and security constraints.
- Named customer sponsor, IT/CRM owner, administrators, department leads, and launch approver.
- Training availability, support hours, escalation expectations, and acceptance criteria.

Recommendation: Treat CRM work as an assessment gate. Do not commit to implementation or launch until discovery confirms feasibility.

2. Conditional 21-Day Rollout

Days	Phase and activities	Dependencies	Owner	Milestone
1-2	Kickoff; validate scope, commercial boundaries, stakeholders, departments, user counts, timeline	Sales handoff; named contacts	Operations + Sales	Discovery complete
3-4	CRM discovery: platform, use	CRM owner and technical access	Operations + Customer IT	Integration feasibility

	cases, data flows, API/security, sandbox, assessment scope			decision
3-5	Draft role catalog, access matrix, provisioning method, SSO/MFA requirements	Department workflows and security input	Operations + Customer IT	Role design approved
5-6	Validate user file, data quality, privacy/retention, department cohorts	Approved template and data owner	Customer IT + Operations	Data accepted
6-7	Confirm training audiences, formats, time zones, accessibility, blackout dates; issue authorized invitations	Availability and scheduling authority	Scheduling	Sessions confirmed
8-10	Configure only approved test setup; prepare CRM/data test cases; administrator training	Approved design and test access	Operations + Customer Admin	Test environment ready
11-13	Integration and access validation; role-based test users; defect remediation	Test data, sandbox, approved roles	Operations + Customer IT	Validation evidence
14-17	Department sessions for four cohorts; attendance and readiness tracking	Confirmed schedule and trained admins	Scheduling + Department Leads	Cohort readiness
18	End-to-end UAT, support rehearsal, access audit, open-risk review	Completed tests and training	Operations + Support	UAT decision
19	Defect closure, rollback rehearsal, launch	No critical unresolved defects	Operations	Executive review pack

	packet preparation			
20	Executive GO/NO-GO review	Evidence and approver availability	Executive Sponsor	Decision recorded
21	Conditional launch or controlled delay; heightened monitoring begins	GO decision only	Operations + Support	Launch status

Any missed critical dependency moves the milestone or requires an explicitly approved scope reduction.

3. Technical and Access Readiness Checklist

CRM integration assessment

- [] CRM platform, edition, owner, environment, and use cases confirmed.
- [] Assessment versus configuration/deployment scope confirmed.
- [] API, authentication, rate limits, permissions, and security review completed.
- [] Source/target fields, data ownership, mappings, and error handling documented.
- [] Sandbox/test environment and representative non-sensitive test data available.
- [] Privacy, retention, regional, and segregation requirements approved.
- [] Positive, negative, duplicate, failure, and rollback tests defined.
- [] Customer CRM owner accepts assessment results.

Identity and role access

- [] Department roster and user counts validated.
- [] Role catalog mapped to job functions using least privilege.
- [] Role approvers identified.
- [] SSO/MFA and lifecycle requirements confirmed.
- [] Provisioning method and required user fields approved.
- [] Test accounts validated by department leads.
- [] Access review and removal process documented.
- [] No production permission changes without explicit authorization.

Operational validation

- [] Admins trained and attendance recorded.
- [] Department champions identified.
- [] UAT evidence complete.

- [] Support procedures and escalation contacts tested.
- [] Rollback criteria and owner documented.

4. Dependencies and Ownership

Deliverable	Primary owner	Required handoff
Scope and commercial boundaries	Sales	Operations
Customer contacts and approvals	Customer sponsor	All teams
CRM assessment	Operations + Customer IT/CRM	Executive decision
Role/access design	Operations + Customer IT	Department leads and approvers
User data quality	Customer IT/data owner	Operations
Training schedule	Scheduling	Support and department leads
Session attendance/readiness	Scheduling + department leads	Operations
Support model	Support	Executive sponsor and Operations
Launch decision	Executive sponsor	All workstream owners

5. Risks and Rollback

Risk	Control	Rollback/contingency
CRM capability or API blocker	Discovery before build; document limitation	Launch without integration only if explicitly approved, otherwise delay
Invalid or incomplete user data	Template, validation, exception report	Hold affected users; do not bulk provision
Incorrect role mapping	Least-privilege review and test accounts	Revoke/adjust affected roles using approved change process
SSO/MFA failure	Test before launch; fallback owner identified	Use approved temporary method or defer affected cohort
Training delays	Record prerequisites,	Stagger cohort launch or

	reminders, backup sessions	restrict access until trained
Data/privacy concern	Security and privacy review	Stop data transfer and escalate to customer/security authority
Critical defect	Severity threshold and UAT gate	Restore prior tested configuration/data state where supported

Rollback capability is not assumed; the actual product's recovery mechanisms must be verified.

6. Proposed Automations

These are design proposals, not deployed workflows.

Automation	Trigger/condition	Safeguard	Approval gate
Missing-input alert	Required roster, CRM, or stakeholder field remains incomplete by deadline	Notify internal owner only; no customer message automatically	Operations approval
Training reminder	Confirmed attendee has upcoming session and no attendance recorded	Respect time zone, opt-out, accessibility, and communication policy	Scheduling approval
Role exception queue	User-role mapping is missing or conflicts with policy	Block provisioning; route to approver	Customer IT/security approval
Integration defect routing	Test fails or exceeds agreed severity threshold	Attach evidence; prevent production changes	Operations/technical approval
Launch readiness dashboard	Required checklist item changes to incomplete or overdue	Read-only status; no automatic GO decision	Executive sponsor approval
Support escalation	Ticket reaches defined severity/age threshold	Mask sensitive data and preserve audit trail	Support lead approval

7. Exception Handling

- Missing customer data: Log the gap, assign an owner and deadline, use no unapproved assumptions, and escalate when the critical-path deadline passes.

- Scheduling conflict: Offer approved alternatives or contingency sessions; do not create bookings without authorized scheduling access and attendee consent.
- Integration blocker: Pause dependent work, document impact, assess scope reduction or revised timeline, and require executive/customer approval.
- Delayed training: Keep affected cohort in "not ready" status; use a backup session or stagger launch. Do not equate registration with completion.
- Support escalation: Classify severity, acknowledge through the approved channel, preserve evidence, and escalate to technical/management owners according to the approved model.

8. Conditional Launch Gate

GO only if

- Scope, stakeholders, customer dependencies, and acceptance criteria are approved.
- CRM assessment is accepted, or an explicit exception is approved.
- User data is validated and role/access design is approved.
- Required testing passes with no unresolved critical defects.
- Administrators and department cohorts meet the agreed readiness threshold.
- Support coverage, escalation paths, and rollback limitations are documented.
- Executive sponsor records the decision.

NO-GO if

- CRM/security feasibility remains unknown.
- Required customer data or approvers are unavailable.
- Critical access, privacy, identity, or integration defects remain.
- Training/support readiness is materially incomplete.
- The 21-day target would require unapproved scope, risk, or contractual assumptions.

9. Measurable KPIs

Final thresholds require executive/customer approval. Recommended measures:

- 100% of required stakeholder and department data validated.
- 100% of planned roles approved before provisioning.
- 100% of production-bound access covered by successful test evidence.
- CRM assessment completed and accepted, or exception formally approved.
- Administrator attendance and department session attendance tracked.
- Zero unresolved critical defects at launch.
- Support routing and escalation test completed.
- Launch decision recorded by the authorized executive approver.

- Post-launch: access incidents, training completion, ticket volume, severity, resolution time, and adoption by department.

Overall decision: Conditional / Not yet ready for GO. Discovery, role design, CRM feasibility, customer data, scheduling, and support approvals remain prerequisites.

Onboarding Scheduling, Training & Appointment Coordination

Nia - Onboarding Scheduling & Training Plan

Status: Planning artifact only. No availability was verified, meetings booked, invitations sent, or reminders activated. The 21-day timeline remains a target pending customer confirmation and Operations feasibility approval.

1. Scheduling assumptions requiring confirmation

- Four department names, headcounts, time zones, and participant lists are not yet provided.
- Assume one customer administrator cohort of up to 10 people.
- Assume four department sessions, one per department, with up to 75 users each.
- Assume virtual delivery, 60-90 minutes per session.
- Assume at least two approved facilitators and one backup facilitator.
- Customer must confirm blackout dates, language, accessibility requirements, recording consent, and attendee email addresses.
- Sessions should not be scheduled until the customer confirms required contacts and audience sizes.

2. Proposed 21-day schedule

Timing	Session/activity	Audience	Owner	Dependency
Days 1-2	Scheduling discovery and availability collection	Sponsor, administrators, department leads	Nia / Sales	Named contacts and department data
Day 3	Tentative administrator kickoff	Sponsor, customer admins, IT/CRM representatives	Nia + Operations	Scope and stakeholder confirmation
Days 4-5	Admin training, Session 1	Customer administrators	Nia / Delivery	Access model and training

				objectives
Day 6	Admin training, Session 2 or office hours	Admins; contingency audience	Nia	Attendance or unresolved questions
Days 7-10	Department onboarding sessions 1-2	Departments 1 and 2	Nia + department champions	Validated users and role mapping
Days 11-14	Department onboarding sessions 3-4	Departments 3 and 4	Nia + department champions	Validated users and role mapping
Days 15-16	Make-up sessions and targeted clinics	No-shows, delayed cohorts, champions	Nia / Support	Attendance exception list
Days 17-18	Readiness rehearsal and Q&A	Admins, department leads, Support	Nia + Soph	Training completion and support model
Days 19-20	Launch-readiness attendance report	Executive sponsor and delivery leads	Nia	Complete attendance and exception data
Day 21	Executive launch decision meeting	Executive sponsor, Operations, Support, Sales	Coordinator	All GO/NO-GO evidence available

The sequence may be compressed or extended after Operations confirms integration, access, and customer-input dependencies.

3. Capacity model

- Administrator sessions: Up to 10 administrators per session; add a second cohort if required.
- Department sessions: Target up to 75 users per session. If a department exceeds that size, split into cohorts rather than exceeding facilitator capacity.
- Facilitator ratio: One facilitator plus one moderator for sessions above 50 attendees.
- Contingency: Reserve at least one make-up window per department or use Days 15-16 for combined recovery clinics.
- Attendance target: Recommended planning threshold of at least 90% of assigned users attending live or completing an approved alternative.
- Session completion: Attendance alone is insufficient; track participation, required exercises, questions, and follow-up actions.

4. Invitation and reminder workflow

1. Collect attendee lists, department assignment, time zone, accessibility needs, and manager approval.
2. Prepare a draft schedule and obtain customer confirmation.
3. Send invitations only through an authorized calendar or communication process.
4. Include objectives, prerequisites, session duration, joining instructions, recording policy, and support contact.
5. Send reminders at:
 - 7 days before the session,
 - 24 hours before,
 - 1 hour before.
6. Capture attendance and completion status after each session.
7. Provide the customer sponsor and department leads with an exception report.

No invitations or reminders have been sent.

5. Rescheduling and no-show rules

Rescheduling

- Permit changes up to an agreed cutoff, such as 24 hours before the session.
- Preserve the original audience-to-session mapping and avoid duplicate bookings.
- Do not move a session without confirming facilitator, customer, and department-lead availability.
- Escalate repeated conflicts or insufficient capacity to Operations and the customer sponsor.

No-show recovery

- Mark the participant as No-show, not complete.
- Send approved self-study or recording access only where authorized and consented.
- Offer the next available make-up session or targeted clinic.
- Escalate department-level attendance below the agreed threshold to the department lead.
- Report unresolved no-shows as a launch-readiness risk.

6. Attendance tracking

Track, per participant:

- Department and role
- Assigned session

- Invitation status
- Attendance status
- Completion or assessment status
- Accessibility or accommodation needs
- Follow-up action and owner
- Make-up session status

Statuses should include: Not invited, Invited, Accepted, Declined, Attended, Partial, No-show, Rescheduled, Complete, Exception.

7. Proposed scheduling automations

These are proposals only; none are deployed or active.

Automation	Trigger and conditions	Safeguards	Approval
Invitation workflow	Approved session record plus validated attendee list	Check duplicates, time zone, consent, and authorized sender	Customer sponsor and delivery owner
Reminder workflow	Confirmed attendee and session approaching	Suppress reminders for cancellations; respect time zone and opt-out rules	Delivery owner
Attendance exception alert	Session marked complete with no-show or attendance below threshold	Notify only authorized leads; avoid exposing unnecessary personal data	Support and customer sponsor
Capacity escalation	Registration exceeds approved session capacity	Do not auto-enroll; propose an additional cohort for approval	Operations and facilitator
Rescheduling workflow	Participant requests a change within policy window	Require a valid alternative slot; prevent overlapping or duplicate appointments	Scheduling owner

8. Scheduling exception handling

- Missing customer data: Pause invitations; request department rosters, contacts, time zones, and availability. Record assumptions rather than filling gaps.
- Scheduling conflict: Offer approved alternate windows or cohort sessions; escalate if the conflict affects a critical department or milestone.
- Integration/access blocker: Keep training focused on confirmed functionality; defer dependent

exercises and notify Operations.

- Delayed training: Use make-up clinics, revised cohorts, or a conditional launch decision. Do not mark users complete without evidence.
- Low attendance: Notify the department lead, schedule recovery, and include the gap in the executive readiness report.
- Facilitator absence: Use the approved backup or reschedule; do not assume coverage.
- Recording/accessibility issue: Provide an approved alternative only after confirming consent, security, and accessibility requirements.

9. Handoff to downstream teams

- Operations: Receive confirmed schedule, attendance metrics, unresolved prerequisites, and access-dependent training gaps.
- Support: Receive session materials, FAQ themes, attendee exceptions, and expected post-launch question volume.
- Coordinator: Receive a final schedule status, attendance dashboard, unresolved scheduling risks, and recommendation on whether training readiness supports GO or NO-GO.
- Customer sponsor: Approves audience lists, session windows, recording policy, make-up rules, and launch attendance threshold.

Overall recommendation: Use the proposed schedule as a conditional template. Do not make calendar commitments until customer data, availability, facilitator capacity, and Operations' feasibility assessment are confirmed.

Customer Support Readiness & Post-Launch Care

Soph - Customer Support Readiness & Post-Launch Care Model

Status: Planning proposal only. No tickets, communications, bookings, automations, or support workflows have been activated.

1. Support coverage model

Period	Coverage proposal	Dependencies
Days 1-7	Define support channels, contacts, hours, escalation owners, and intake categories	Customer sponsor and Operations confirm contacts
Days 8-13	Prepare knowledge base, triage	Opi confirms technical design

	scripts, access troubleshooting, and CRM integration FAQs	and test findings
Days 14-17	Support presence during four department sessions; capture recurring questions	Nia provides confirmed schedule and attendance data
Days 18-20	Conduct support rehearsal, validate escalation routes, and review open defects	UAT, role testing, and training completion evidence
Day 21	Launch-day monitoring if GO decision is recorded	Executive approval and confirmed Support coverage
Days 22-28	Heightened post-launch care, daily issue review, and customer check-ins	Successful launch or explicitly approved controlled rollout

Recommended coverage includes a named support lead, technical escalation owner, Operations liaison, customer administrator, and department champions. Actual hours and channels require approval; no availability is assumed.

2. Severity classification and escalation

Severity	Example	Initial response target*	Escalation
Sev 1 - Critical	Broad outage, data exposure, critical access failure, launch-blocking integration defect	Immediate/urgent	Support Lead ? Operations/Technical Lead ? Executive Sponsor and customer IT
Sev 2 - High	Major department unable to perform core workflow; significant SSO or role issue	Same business day	Support Lead ? Operations and customer administrator
Sev 3 - Normal	Individual access issue, configuration question, training-related defect with workaround	Next business day	Support ? Knowledge Base or Operations
Sev 4 - Informational	How-to question, enhancement request, documentation correction	Standard queue	Support owner; aggregate for review

*Targets are proposed service objectives, not contractual commitments. Final targets require approval.

Escalation safeguards:

- Capture affected users, department, timestamps, screenshots/logs, environment, and business impact.
- Never request or store passwords, secrets, or unnecessary personal data.
- Freeze unapproved permission or production changes while an access incident is investigated.
- Sev 1 incidents require an incident owner, update cadence, decision log, and explicit closure confirmation.
- Any unresolved Sev 1 or material Sev 2 issue is a launch NO-GO unless the executive sponsor approves a documented exception.

3. Knowledge base and user-assistance checklist

- [] Confirm approved support channels, hours, contacts, and customer escalation route.
- [] Publish administrator quick-start guide.
- [] Publish department role and access guide.
- [] Document SSO/MFA sign-in and common access troubleshooting.
- [] Provide CRM integration scope, known limitations, and failure guidance.
- [] Add "how to request access" and role-change procedures.
- [] Add training recordings or self-study only where recording and distribution are authorized.
- [] Include department-specific workflows and terminology.
- [] Add known issues, workarounds, and escalation criteria.
- [] Validate accessibility, language, privacy, and version ownership.
- [] Assign review dates and named content owners.
- [] Test articles with an administrator and at least one representative from each department.

4. Training-related support procedures

1. Nia supplies Support with the confirmed session calendar, participant lists, prerequisites, and attendance status.
2. Support attends or monitors department sessions during the proposed Days 14-17 window.
3. Questions are categorized as:
 - access/configuration,
 - workflow/how-to,
 - integration defect,
 - documentation gap,
 - enhancement request.
4. No-shows are recorded as No-show, not complete.

5. Missed attendees receive an approved make-up session or clinic; self-study material is shared only when authorized.
6. A cohort remains not ready if required training or access validation is incomplete.
7. Repeated questions are converted into knowledge-base updates after Operations confirms technical accuracy.
8. Department attendance below the approved threshold is reported to Nia, Operations, and the customer sponsor.

5. Proposed go-live communication drafts

Customer launch-readiness notice

Subject: Proposed onboarding launch-readiness status

The onboarding team has completed the current readiness review. The decision remains conditional on validated user data, approved role mappings, CRM assessment results, completed required testing, training attendance, support coverage, and closure or approved treatment of critical risks.

The authorized executive sponsor will record the final GO/NO-GO decision. This message is a draft and has not been sent.

Launch-day support notice

Subject: Onboarding support during launch

During the approved launch window, please submit issues through the designated support channel with the affected department, user, time, and business impact. Do not include passwords or security credentials. Critical access, privacy, or service-impacting issues should be marked urgent and will be triaged under the agreed severity process.

Support coverage and channels must be confirmed before distribution. This message is a draft and has not been sent.

Post-launch check-in

Subject: Post-launch onboarding check-in

We are collecting feedback on access, training, workflows, and support. Please report unresolved

issues through the approved support route and complete the short satisfaction survey. Department champions will also be asked to identify recurring friction and adoption barriers.

This message is a draft and has not been sent.

6. First-week monitoring schedule

Timing	Review activity	Owner
Launch day	Monitor ticket queue, access failures, integration errors, and critical incidents	Support + Operations
Daily, Days 1-3	Review Sev 1/2 incidents, aging tickets, user-impact patterns, and training gaps	Support Lead
Daily, Days 1-5	Department champion check-in and adoption issue review	Support + Nia
Day 3	Publish internal issue trend and knowledge-gap report	Support
Day 5	Customer sponsor status review and unresolved-risk decision	Support + Operations
Day 7	First-week care review: ticket metrics, satisfaction, adoption, open defects, and exit from heightened monitoring	Support Lead + Executive Sponsor

Proposed exit criteria: no unresolved Sev 1 issues, an agreed plan for Sev 2 issues, stable access/error trends, support routing functioning, and customer sponsor acceptance.

7. Feedback and satisfaction approach

Collect feedback at:

- End of each administrator and department session.
- 48-72 hours after launch.
- End of the first week.
- After closure of Sev 1/2 incidents.

Measure:

- Training usefulness and confidence.
- Ease of sign-in and role access.
- Ability to complete priority workflows.
- Support responsiveness and resolution quality.
- Satisfaction score and free-text concerns.
- Adoption by department and unresolved friction points.

Feedback should be aggregated by department where possible, with privacy safeguards and no unsupported claims about satisfaction.

8. Dependencies and exceptions

Dependency or exception	Support response
Missing customer contacts or support hours	Keep coverage plan provisional; escalate to sponsor before launch
Scheduling conflict or missed session	Coordinate with Nia; use approved make-up capacity; do not mark attendance complete
Integration blocker	Open or link a technical incident, pause dependent readiness claims, and route to Operations
Access-related issue	Verify approved role and identity data; block unauthorized changes; escalate security-sensitive cases
Delayed training	Maintain cohort "not ready" status; restrict launch if required training is incomplete
Critical support escalation	Assign incident owner, preserve evidence, provide approved updates, and require executive disposition
Unresolved critical incident at launch	Automatic proposed NO-GO unless formally risk-accepted by the authorized executive sponsor

9. Support readiness gate

Support is ready for launch only when:

- Support channel, coverage, owners, and escalation contacts are confirmed.
- Severity model and response objectives are approved.

- Knowledge-base minimum set is reviewed and available.
- Support rehearsal has been completed.
- Nia has supplied training attendance and exception data.
- Opi confirms technical limitations, known issues, and rollback constraints.
- Customer administrators and department champions know how to raise issues.
- No unresolved critical support or access risk remains without documented approval.

Current status: Not confirmed ready. These are proposed controls; no operational support setup has been executed.

Unified Enterprise Onboarding & Launch Readiness Decision

Enterprise Onboarding & Launch-Readiness Decision Package

Status: Planning artifact only. Customer, departments, integrations, availability, bookings, permissions, communications, and automations are fictional/unverified. No onboarding activity has been executed.

1. Executive summary

A 21-day rollout is conditionally feasible, but not currently ready for commitment or launch. The critical path is:

1. Confirm scope, stakeholders, departments, user counts, and acceptance criteria.
2. Assess CRM feasibility before promising implementation.
3. Approve role and access design.
4. Validate the 300-user data file and security requirements.
5. Confirm training capacity and customer availability.
6. Establish support coverage and escalation ownership.
7. Complete testing, UAT, training, and executive approval.

Current recommendation: NO-GO pending discovery. The target may become a conditional GO only after all launch gates are evidenced and approved.

The available upstream outputs include Operations and Scheduling. Morgan's detailed commercial handoff and Soph's support plan were not supplied in the shared outputs; those remain required inputs and are explicitly unresolved.

2. Consolidated requirements-to-delivery matrix

Requirement	Delivery approach	Owner	Evidence/gate
300 users across four departments	Validate roster, department allocation, time zones, and exceptions	Customer IT + Operations	Accepted user file
CRM integration assessment	Confirm platform, edition, API, security, data flows, sandbox, and scope	Operations + Customer CRM owner	Accepted assessment
Role-based access	Least-privilege role catalog, approval matrix, test users, SSO/MFA review	Operations + Customer IT	Approved access matrix and test evidence
Administrator training	Up to 10 administrators per session; backup/office-hours session	Scheduling + Operations	Completion and exercise records
Department onboarding	Four cohort sessions, target maximum 75 users each	Scheduling + Department leads	Attendance and readiness report
Support readiness	Routing, severity model, escalation contacts, knowledge materials, rehearsal	Support + Operations	Tested support model
Executive launch decision	Consolidated risk, test, attendance, and support evidence	Executive sponsor	Recorded GO/NO-GO decision
21-day target	Conditional schedule, not a verified commitment	All workstream owners	Approved dependency plan

3. Integrated 21-day roadmap

Days	Work	Dependencies	Owner	Milestone
1-2	Kickoff, scope, stakeholders, departments, user	Sales handoff and named contacts	Sales + Operations	Discovery complete

	counts, commercial boundaries			
3-4	CRM discovery and security/API assessment	Customer CRM owner and technical access	Operations + Customer IT	Feasibility decision
3-5	Role catalog, provisioning, SSO/MFA requirements	Department workflows and security input	Operations	Role design drafted
5-6	Roster, data-quality, privacy, and retention validation	Approved template and data owner	Customer IT + Operations	Data accepted
6-7	Confirm audiences, time zones, accessibility, blackout dates	Validated contacts and scheduling authority	Scheduling	Sessions authorized
8-10	Approved test setup, test cases, administrator training	Approved design and test access	Operations + Scheduling	Test environment ready
11-13	Integration/access validation and defect remediation	Sandbox, test users, approved roles	Operations + Customer IT	Validation evidence
14-17	Four department sessions and readiness tracking	Confirmed schedule and trained admins	Scheduling + Department leads	Cohort readiness
15-16	Make-up sessions/targeted clinics	Attendance exception list	Scheduling + Support	Recovery complete
18	UAT, support rehearsal, access audit, risk review	Testing and training evidence	Operations + Support	UAT decision
19	Defect closure and launch packet	No critical unresolved defects	Operations	Executive pack ready
20	Executive GO/NO-GO review	Complete evidence and approvers	Executive sponsor	Decision recorded
21	Conditional launch or controlled delay	Formal GO only	Operations + Support	Launch status

Any missed critical dependency requires a schedule change or explicit approved scope reduction.

4. Technical, scheduling, and support risk register

Risk	Impact	Mitigation	Escalation/decision
CRM platform/API unknown	High; blocks integration scope	Discovery before build	Operations and executive sponsor
Missing or invalid roster	High; unsafe provisioning	Validation template and exception report	Customer IT owner
Incorrect role mapping	High; access/security exposure	Least-privilege review and test accounts	Customer IT/security approver
SSO/MFA failure	High; users cannot access	Pre-launch identity testing	Customer IT + Operations
Department sizes exceed 75	Medium; training capacity constraint	Split cohorts and add facilitators	Scheduling + sponsor
Scheduling conflicts/time zones	Medium; attendance delay	Confirm availability, backup windows	Scheduling + department lead
Delayed administrator training	High; blocks downstream readiness	Day 6 backup session/office hours	Operations + sponsor
Integration or privacy blocker	High; launch may be unsafe	Pause dependent work; document exception	Customer security/exec authority
Support model incomplete	High; poor launch response	Rehearsal and named escalation owners	Support lead + sponsor
Rollback capability unverified	High; recovery uncertainty	Verify product-specific recovery process	Operations/technical approver

5. Training and capacity plan

Planning assumptions requiring confirmation:

- Four departments, up to 75 users each.
- Administrator cohort of up to 10.
- Virtual sessions lasting 60-90 minutes.
- One facilitator plus moderator for sessions above 50 users.
- At least two facilitators and one backup.

- Attendance/readiness target: at least 90% live attendance or approved alternative.
- Registration does not equal completion.

Schedule:

- Days 1-2: scheduling discovery and availability collection.
- Day 3: administrator kickoff.
- Days 4-5: administrator training.
- Day 6: backup session or office hours.
- Days 7-14: four department sessions.
- Days 15-16: make-ups and targeted clinics.
- Days 17-18: readiness rehearsal and Q&A.
- Days 19-20: attendance and exception reporting.
- Day 21: executive decision.

Invitations and reminders must not be sent without customer confirmation and authorized scheduling/communications access.

6. Support coverage and post-launch care

Soph's detailed support output was not present; the following is the required support baseline for approval:

- Define support hours, channels, customer contacts, and service expectations.
- Establish severity levels:
 - Critical: access outage, security/privacy issue, or launch-blocking defect.
 - High: major department impairment with no reasonable workaround.
 - Medium/Low: localized issue, question, or documentation request.
- Route Critical issues immediately to Support, Operations, technical owner, and customer sponsor.
- Preserve logs, evidence, affected users, timestamps, and data-minimized ticket details.
- Conduct a support rehearsal on Day 18.
- Provide heightened monitoring after launch, with daily reviews during the initial care period.
- Track ticket volume, severity, response, resolution, access incidents, and recurring issues.
- Hold a post-launch review and transition to normal support only after agreed stability evidence.

7. Ownership and handoffs

Handoff	From	To	Required artifact
Commercial scope and commitments	Sales/Morgan	Operations	Requirements and boundary matrix
Customer contacts and approvals	Customer sponsor	All teams	Named-owner register
CRM requirements	Sales + customer CRM owner	Operations	Use-case and integration brief
Role/access design	Operations	Customer IT/security and department leads	Approved access matrix
Validated roster	Customer IT	Operations + Scheduling	Accepted user file
Training schedule	Scheduling/Nia	Support, Operations, department leads	Confirmed schedule and capacity report
Attendance/readiness	Scheduling	Operations + executive sponsor	Completion and exception report
Support model	Support/Soph	Operations + executive sponsor	Coverage and escalation plan
Launch evidence	Operations, Scheduling, Support	Executive sponsor	Decision packet
Launch decision	Executive sponsor	All owners	Recorded GO/NO-GO

8. Proposed automations

These are proposals only-not deployed workflows.

Automation	Trigger/condition	Safeguard	Approval gate
Missing-input alert	Required roster, CRM, or stakeholder field overdue	Internal alert only; no automatic customer message	Operations
Training reminders	Confirmed attendee has upcoming session	Time-zone, opt-out, accessibility, and consent checks	Scheduling
Role exception queue	Missing or conflicting role mapping	Block provisioning; route to approver	Customer IT/security
Integration defect	Test failure exceeds	Attach evidence;	Operations/technical

routing	defined severity	prevent production changes	owner
Readiness dashboard	Checklist item overdue/incomplete	Read-only; cannot auto-declare GO	Executive sponsor
Support escalation	Ticket reaches severity/age threshold	Minimize sensitive data and preserve audit trail	Support lead
No-show recovery	Attendance marked No-show	Offer only approved sessions/materials	Scheduling + department lead

9. Exception handling

- Missing customer data: Log gap, assign owner/deadline, do not infer values, and escalate when it affects the critical path.
- Scheduling conflict: Preserve audience mapping, offer approved alternatives, and escalate if capacity or facilitator coverage fails.
- Integration blocker: Pause dependent configuration, document impact, assess approved scope reduction or delay, and obtain executive/customer approval.
- Delayed training: Keep affected users/cohort "not ready"; use make-up training or stagger launch. Do not treat registration as completion.
- Support escalation: Classify severity, preserve evidence, notify the defined technical/management owners, and maintain an auditable status.
- Privacy/security concern: Stop data transfer or provisioning and escalate to the authorized security decision-maker.
- Critical defect: No launch until fixed, accepted with formal exception, or affected scope is removed with approval.

10. KPIs

Recommended thresholds require customer and executive approval:

- 100% required stakeholders and department data validated.
- 100% planned roles approved before provisioning.
- 100% production-bound access covered by successful test evidence.
- CRM assessment accepted or formally excepted.
- At least 90% of assigned users attend or complete an approved alternative.
- 100% administrators complete required training.
- Zero unresolved Critical defects at launch.

- 100% support escalation paths tested.
- Launch decision recorded by the authorized executive.
- Post-launch: ticket volume, severity, response/resolution time, access incidents, training completion, and department adoption.

Launch checklist and decision

GO requires

- Scope and commercial boundaries confirmed.
- Named customer sponsor, IT/CRM owner, administrators, department leads, and launch approver.
- CRM feasibility accepted or formally excepted.
- User data validated; role/access design approved.
- Identity, security, privacy, and test evidence complete.
- Required administrator and department training completed to approved threshold.
- Support coverage and escalation rehearsal complete.
- No unresolved Critical defects.
- Rollback/recovery limitations documented.
- Executive sponsor records GO.

NO-GO conditions

- CRM/security feasibility remains unknown.
- Required customer data or approvers are unavailable.
- Critical access, privacy, identity, or integration defects remain.
- Training or support readiness is materially incomplete.
- The 21-day target requires unapproved assumptions or scope.
- Recovery/rollback capability is not understood.

Final recommendation

Conditional NO-GO / not yet launch-ready. Proceed with discovery and evidence collection, but do not represent the 21-day target as committed. Required human approvals are:

1. Sales-to-Operations scope handoff.
2. Customer IT/security approval of integration and access design.
3. Customer sponsor approval of roster, training schedule, and acceptance criteria.
4. Support lead approval of coverage and escalation model.

5. Executive sponsor's final GO/NO-GO decision.

No users were provisioned, integrations activated, meetings booked, communications sent, or automations deployed.