

Volume

2

STRATEGIC ALLIANCE PRACTICUM

Business Partner Blueprint

ALLIANCE DESIGN & CONTRACT OUTLINE CHECKLISTS

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About this Guide

Developing strategic alliances with other suppliers and with large corporate partners involves addressing numerous issues. Thinking through these issues in the beginning ensures that you and your long term partner have set a workable foundation for designing a relationship that will deliver expected results with the benefit of pre-addressing the most common of issues.

This guide can be used as a template to design your relationship. You can either place a “yes” besides an item to indicate that it is applicable to the relationship you are looking to develop or place a “no” so that you can assure yourself it was considered but deemed not applicable at this time.

You additionally can take either the blank template or your pre-populated temple from above and jointly develop your relationship outline with your potential partner.

The next step is to summarize your discussion points and agreements of this items with your potential partner.

These discussion points and agreements can potentially form the outline for your scope of work. They additionally can also form the basis for your formal contract.

You should be able to take your discussion points and agreement to legal counsel. An actual contract or agreement can be developed by your legal team from these items.

This guide can also be used during your quarterly or annual meetings with your partners to identify areas for improvement or next steps in the development of the relationship.

Enjoy!

Alliance Templates

Item	Applicable (Y/N)
1. INTRODUCTION	
2. PURPOSE	
3. GLOSSARY	
4. VENDOR DEMOGRAPHICS	
4.1. VENDOR INFORMATION	
4.2. VENDOR CONTACT INFORMATION	
4.3. VENDOR'S FINANCIAL INFORMATION	
4.4. CLIENT PORTFOLIO	
4.5. CERTIFICATIONS	
4.6. HUMAN RESOURCES MANAGEMENT PLAN	
4.7. VENDOR'S BUSINESS FOCUS	
4.8. CONFLICT OF INTEREST	
4.9. PROCESS IMPROVEMENTS	
4.10. SUBCONTRACTS	
5. RFP STATEMENT OF WORK (SOW)	
5.1. PURPOSE	
5.2. SCOPE OF WORK TO BE OUTSOURCED	
5.2.1. Background	
5.2.2. Requirements	
5.2.3. Environment Requirements	
5.2.4. Service Level Expectation	
5.3. REFERENCE TO APPLICABLE DOCUMENTS	
5.4. STANDARDS TO BE FOLLOWED	
5.5. APPLICABLE POLICIES AND GUIDELINES	
5.6. PROCESS AND PROCEDURES	
5.7. DETAIL TASKS AND DELIVERABLES	
5.8. ROLES AND RESPONSIBILITIES	
5.9. SCHEDULE AND TIMELINE	
5.10. REPORTING AND STATUS PROCEDURES	
5.10.1. Status Reports	
5.10.1.1. Weekly Status	
5.10.1.2. Monthly Status	
5.10.1.3. Quarterly Status	
5.10.1.4. Annual Executive Strategic and Operational Alignment	
5.10.2. Financial Status Reports	
5.10.3. Communications Period	
5.10.4. Communications Mode	
5.11. PROBLEM ESCALATION	

Item	Applicable (Y/N)
5.11.1. Escalation Triggers	
5.11.2. Client Escalation Process	
5.11.3. Vendor Escalation Process	
5.12. ASSUMPTIONS	
5.13. CONTRACT AND WORK PROCESS ADMINISTRATION	
5.14. PAYMENT SCHEDULE	
5.15. PRIMARY POINT OF CONTACT	
5.16. ENTRY/EXIT CRITERIA	
5.17. ACCEPTANCE CRITERIA	
5.18. KNOWLEDGE TRANSFER	
5.19. STAFFING PROFILE	
6. VENDOR VALUE PROPOSITION AND PRACTICES	
6.1. QUALITY PLAN	
6.1.1. Quality Goals	
6.1.2. Planned Measurement	
6.1.3. Methodology	
6.1.4. Metrics Computation	
6.2. SERVICE LEVEL AGREEMENT (SLA)	
6.2.1. Service Level Requirements	
6.2.2. Metrics	
6.2.3. Applicable Documents	
6.2.4. Performance Improvements	
6.3. RISK MANAGEMENT	
6.4. CAPABILITIES AND STRENGTHS	
6.4.1. Business Core Competencies	
6.4.2. Continuous Process Improvements	
6.4.3. Business Strategies	
6.4.4. Management practices and procedures	
6.4.5. Technology Migration	
6.4.6. Training and Skills Development	
6.4.7. Staff Attrition and Retention	
6.5. OUTSOURCING EXPERTISE	
6.5.1. Profile of outsourcing clients	
6.5.2. Reference Check	
6.5.3. Outsourcing model	
6.5.4. Resumes of Key Personnel	
6.6. INFRASTRUCTURE	
7. PROCESSES & METHODOLOGIES	
7.1. TRANSITION APPROACH	
7.2. PROBLEM MANAGEMENT	

Item	Applicable (Y/N)
7.3. SECURITY POLICY	
7.4. CHANGE MANAGEMENT PLAN	
7.5. VALIDATION AND VERIFICATION	
7.6. BUSINESS CONTINUITY	
7.7. PROJECT AND QUALITY MANAGEMENT	
7.8. CONFIGURATION MANAGEMENT	
7.9. AUDITS AND INSPECTIONS	
7.10. EXIT STRATEGY	
7.11. CUSTOMER SATISFACTION	
7.12. COMMUNICATION MANAGEMENT	
7.13. DISPUTE RESOLUTION	
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8.4. WARRANTY	
8.5. ACCOUNTING RECORDS	
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9.3. VENDOR RESPONSE FORMAT	
10. ABOUT THE CLIENT	
10.1. CLIENT BUSINESS DESCRIPTION	
10.2. NATURE OF RELATIONSHIP	
11. OTHER CONTRACT ITEMS	
11.1. WORK ORDER	
11.1.1. Change Management	
11.1.2. Stop Work Order	
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11.3. CONTRACT TERMINATION AND SURVIVAL	
11.3.1. Right to Terminate	
11.3.2. Penalty	
11.3.3. Tasks and Deliverables	
11.3.4. Contract Provisions	
11.4. OWNERSHIP AND RIGHTS	
11.5. WARRANTIES	
11.6. EMPLOYEE AGREEMENTS	
11.7. DELIVERY AND ACCEPTANCE	
11.8. PROPRIETARY INFORMATION	
11.8.1. Client Confidential Information	
11.8.2. Vendor Confidential Information	

Item	Applicable (Y/N)
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11.10. INDEPENDENT CONTRACTOR STATUS	
11.10.1.Independent Contractor	
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11.10.3.Income Taxes	
11.10.4.Employment Benefits	
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11.12. GOVERNING LAW	
11.13. SUBCONTRACTING	
11.14. FORCE MAJEURE	
11.15. GOVERNMENT REGULATION	
11.16. DISPUTE RESOLUTION	
11.17. ENTIRE AGREEMENT	