

Customer evidence. An agreed next discussion.

A worked customer-review pack for provider account managers and technical leads. All customer details, findings and costs are fictional demonstration data.

IT PROVIDERS / ILLUSTRATIVE DEMONSTRATION DATA

01 / SCOPE AND INTENDED DECISION

Define the decision before the findings.

Example Managed Services / Example Customer, one fictional office. The decision is what the customer should investigate and who owns each next action.

Included in this example

An agreed customer asset scope, selected evidence, provider recommendations, customer decision owners and hardware planning inputs.

Not established by this review

Access to other customers, every service or control assessed, a delivery contract, accepted quotations, programme margins or guaranteed sales.

01

Provider prepares

Scope, evidence and limitations
Technical lead checks the findings



02

Customer reviews

Requirements, priorities and budget
Customer approver owns the decision



03

Both agree actions

Evidence owner and next review
Project delivery is arranged separately

Illustrative it providers review structure. This is an editorial example, not a customer account or a full platform export.

For the review discussion: The provider explains findings and options; customer owners confirm requirements and approve expenditure. Project delivery and commercial terms are agreed separately.

ILLUSTRATIVE EXAMPLE / DEMONSTRATION DATA

Show the evidence. Keep the gaps visible.

Demonstration findings with explicit limitations and a named next responsibility.

Customer device cohort

Review required

EVIDENCE AND LIMITATION

A customer register is supplied. Workloads, assignments and retained devices need customer confirmation.

NEXT RESPONSIBILITY

Provider lead and customer IT owner: validate the cohort together.

Recovery evidence owner

Evidence incomplete

EVIDENCE AND LIMITATION

Backup notes exist. The latest restoration result and its responsible owner are missing.

NEXT RESPONSIBILITY

Customer service owner: agree who obtains and reviews test evidence.

Customer network project

Planning input

EVIDENCE AND LIMITATION

Two units are proposed for review. Design, exclusions and the delivery responsibility are unconfirmed.

NEXT RESPONSIBILITY

Provider lead: review options; customer approver reviews full costs.

Other managed services

Not assessed

EVIDENCE AND LIMITATION

Email, cloud access and other customer services are outside this example. No conclusion is reached.

NEXT RESPONSIBILITY

Account manager and customer: agree any separate review scope.

Review required

Needs review; not a verified failure.

Evidence incomplete

Supporting evidence is still needed.

Not assessed

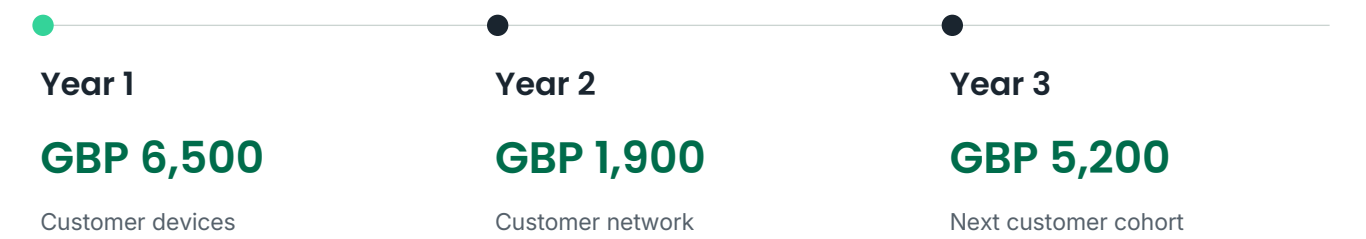
No conclusion; a gap is not a positive finding.

ILLUSTRATIVE EXAMPLE / DEMONSTRATION DATA

Phase the work. Validate the costs.

Fictional hardware quantities and unit costs. Investigation, approval and delivery are separate steps.

THREE-YEAR HORIZON / DEMONSTRATION VALUES



Year 1	Validate the evidence first Agree the customer evidence owner, confirm asset scope and obtain missing recovery information. Owner: provider technical lead.	To quote Review and survey costs to confirm
Year 1	Customer devices Confirm customer workloads and obtain a scoped quotation. Approval: customer; review: provider lead.	GBP 6,500 10 x GBP 650
Year 2	Customer network Confirm design, delivery scope and customer change window. Approval: customer; proposal: provider.	GBP 1,900 2 x GBP 950
Year 3	Next customer cohort Review customer requirements and the revised asset baseline. Approval: customer; review: provider.	GBP 5,200 8 x GBP 650

ILLUSTRATIVE HARDWARE SUBTOTAL

GBP 13,600

Fictional quantities and unit costs. Survey, implementation, licensing, support, disposal, VAT and contingency are excluded. Obtain current quotes and review the full project budget.

Proposed priorities and dates are discussion inputs. Revisit the plan when evidence, requirements or prices change; no expenditure or delivery is approved by this example.

01 Scope

02 Findings

03 Roadmap

04 Decision

ILLUSTRATIVE EXAMPLE / DEMONSTRATION DATA

Record the assumptions. Agree the next decision.

Keep the evidence owner, investment approver and next review point explicit.

01

Customer scope and ownership

Confirm the customer, locations, evidence owners and authorised collection methods.

02

Customer budget and quotation

Use a scoped quotation with exclusions; the customer approves expenditure separately.

03

Provider delivery responsibilities

Agree design, changes, dependencies and any work owned by a third party or customer.

04

Programme and review boundaries

Confirm commercial terms separately and schedule the next evidence and action review.

Questions for the customer review

Which evidence comes from the customer, provider or another supplier?

Who confirms requirements and approves the customer investment?

Which project costs and delivery responsibilities still need agreement?

When will the account manager and customer review actions together?

Discuss your customer-review workflow.

Bring customer scope and onboarding responsibilities.

[Discuss a partnership](#)[Use this sector checklist](#)

Editorial demonstration only. Product scope and outputs depend on the assessment and onboarding agreed. This example is not certification, a quotation or an approved project.