

Prepare the next customer review.

A checklist for provider account managers and technical leads. Agree customer evidence, approval and delivery responsibilities before arranging access.

01 Customer scope and authority

- | | |
|---|--|
| ☐ Which customer decision and review date does this assessment support? | ☐ Which customer, sites, services and evidence sources are included? |
| ☐ Who authorises collection and confirms the customer's framework scope? | ☐ Who reviews findings, approves customer costs and owns each action? |

02 Evidence and customer discussion

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|--|--|
| ☐ Which findings have evidence, and which customer areas remain unassessed? | ☐ How will provider and customer teams reconcile the asset baseline? |
| ☐ Does the review separate recommendations from customer-approved projects? | ☐ Which quotation, exclusions and delivery responsibilities need agreement? |

03 Onboarding and partnership terms

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|--|--|
| ☐ Which collection methods and customer access arrangements are authorised? | ☐ What access and evidence roles are needed for each provider and customer? |
| ☐ What programme, support, training and pilot terms are in the proposal? | ☐ How does the distributor coordinate the route and who owns the next step? |

Agree privacy, processing and customer authority before connecting data. A partnership discussion does not activate a trial or grant customer access. Confirm scope and programme terms in the written proposal.

[Explore asitplan for IT providers](#)

[Discuss the partnership route](#)

Make customer actions and ownership explicit.

Print this worksheet or reuse its columns. Record evidence gaps, responsibilities and a review point.

CUSTOMER / SITES IN SCOPE

NEXT CUSTOMER REVIEW

CUSTOMER APPROVER / PROVIDER LEAD

Customer area / decision	Evidence / owner / gap	Action / approver / review
Scope / authorisation		
Asset reconciliation		
Customer evidence gaps		
Recommendations		
Approval / delivery		
Next customer review		

Decision / assumptions to validate

[Discuss your provider customer-review workflow: Discuss a partnership](#)