

# ENGAGEMENT PLANNING

01

## Presentation To Technical Team

FindBob to present to Enterprise stakeholders.

02

## Mutual NDA

FindBob to provide mutual non-disclosure for review by Enterprise.

03

## Security & Privacy Audit

FindBob to provide Security & Privacy Overview for risk analysis by Enterprise.

04

## Needs & Business Case Workshop

FindBob to lead a requirements workshop with the Enterprise and co-develop business case

05

## Requirements Presentation

FindBob to demonstrate proof-of-concept to Enterprise based on requirements workshop

06

## Presentation of Proposal & Order Form

FindBob to share Proposal and Order Form to Enterprise. Discuss typical legal review process.

07

## Approval of Financial Terms

Enterprise to provide approval on any pricing / financial terms.

08

## Redlines Received

Establish timeline for legal turns if necessary.

09

## Proposal & Order Form Signed

FindBob and Enterprise to execute agreements.

10

## Customer Success Welcome Series

In advance of formal kickoff, FindBob Customer Success Team will initiate communication and establish momentum.

11

## Pre-Kickoff Homework

Provide checklist of items to Enterprise and FindBob pre-project kickoff.

12

## Project Kickoff

Establish roles, review homework and implementation rollout.