

Example of a Draft Buying Evaluation Plan

Date Scheduled	Date Completed	Go/No Go*	Event	Billable	Responsible Party
May 28			Detailed information gathering for T/E Automation		ABCO
June 11		√	Transition plan discussion with project leader		Both
June 16		√	Prove capabilities to team members		ABCO
June 22		√	Share costs/value of project		ABCO
June 26			Provide contracts for legal review		ABCO
July 8		√	Gain legal approval of contracts		Both
July 22		√	Conduct pre-decision review		Both
July 30		√	Deliver proposal		ABCO
Aug 15			Transition Kickoff		Both

Draft

*Please note that we will stop at each Go/No Go to mutually decide if we should continue the Evaluation Plan

NOTE: The use of an evaluation plan can be accomplished at any point in the buy-sell cycle with a prospect. The key is to document the plan in writing and gain agreement with the buying committee. The buying committee may be a single person in some situations, on complex sales it is typically more than 3 individuals.

[Sample of a Transition Plan and a combined Buying-Transition Plan](#)

Example of a Draft Buying Evaluation Plan Cover Letter

Thank you for coordinating the meeting to assess the status of your evaluation of ABCO Expense Management software & services. In addition to your objectives of reducing finance admin. costs and maintaining compliance to SOX we also reviewed the objectives of other committee members:

VP WW Travel	Maximize corporate card rebate potential Maintain level of service at lowest cost
Dir of AP	Reduce TEM admin costs Reduce TEM reimbursement time
VP of Sales	Increase sales (by spending less time on paperwork)

Based upon the potential benefit to your organization, we all agreed to commit the resources needed to further evaluate our offerings. We also mapped out time frames and activities needed to formulate a recommendation.

I've documented a plan complete with mutually agreed upon Go/No Go steps on the attached page. At each of these critical steps, I would like to ensure there is consensus among all people involved that we should proceed.

Based upon your schedule, I shall try to minimize your time requirements, but will keep you apprised of progress. I ask that you participate with the group in the pre-decision meeting currently scheduled for the week of July 18th.

I am pleased the group has decided to move forward on the evaluation. Please review the attached plan and let me know if any modifications need to be made. I look forward to working with you and your organization.

Encl: Draft Buying Evaluation Plan



[Best Buying Experience](#)

Example of a Suggested Evaluation Plan

Date Scheduled	Date Completed	Go/No Go	Event	Billable	Responsible Party
			Detailed information gathering for T/E Automation		
			Transition plan discussion with project leader		
			Prove capabilities to team members		
			Present costs/value of project		
			Provide contracts for legal review		
			Gain legal approval of contracts		
			Conduct pre-decision review		
			Deliver proposal		
			Transition Kickoff		

Draft

*Please note that we will stop at each Go/No Go to mutually decide if we should continue the Evaluation Plan

NOTE: This tool can be used during conversations with buying committees, (which may be a single person on some projects), to discuss the various steps/events customers have used in the past to make beneficial buying decisions. There are no dates listed on purpose, the focus is first the steps/events. Once these are defined, then it is appropriate to ask, "if you were to decide to go forward, when would you want the capabilities we've been discussing to be up and running?" Then work backwards to fill in the other dates. Use a top-down, bottom-up approach to triangulate if the dates listed are actually possible.