BIZTHRIVERS / FREE AGENCY RESOURCE

Define the first delivery.

Use role names and sample values. Record decisions here; keep passwords in a secure access system.

01 **First useful outcome**

Decision / owner: _____

02 **Included scope and exclusions**

Decision / owner: _____

03 **Decision maker and delivery owner**

Decision / owner: _____

04 **Access status and asset owner**

Decision / owner: _____

05 **Routing, availability and exceptions**

Decision / owner: _____

06 **Acceptance evidence and handover**

Decision / owner: _____

Kickoff: outcome → scope → ownership → access → tests → review

The editable pack adds intake questions, an access-status table and an owner matrix. Use the resource page to edit a planning example and download a full test record.

Client approver: _____ Agency builder: _____
Operating owner: _____ Next review: _____

Observe, approve, hand over.

Mark a result only after observing it. Keep a record of the tested scope and remaining fixes.

01 Agree the first delivery

The client can describe the first outcome and distinguish included work from later requests.

Result: Untested / Needs work / Passed Evidence / owner: _____

02 Confirm access without collecting passwords

The builder has the access needed for this scope, with an owner for anything still blocked.

Result: Untested / Needs work / Passed Evidence / owner: _____

03 Assign the next step and fallback

Each handoff has a named role, communication window and visible exception path.

Result: Untested / Needs work / Passed Evidence / owner: _____

04 Observe a controlled end-to-end test

Observed behavior matches the written acceptance criteria; evidence is retained.

Result: Untested / Needs work / Passed Evidence / owner: _____

05 Get the agreed release decision

The approver accepts the tested scope or records specific fixes before release.

Result: Untested / Needs work / Passed Evidence / owner: _____

06 Leave an operating handover

The operating owner knows what to check, how to pause a problem and whom to contact.

Result: Untested / Needs work / Passed Evidence / owner: _____

Release decision and remaining fixes

Decision: _____ Approver: _____
Fixes / owner: _____
Where to monitor / pause a problem: _____